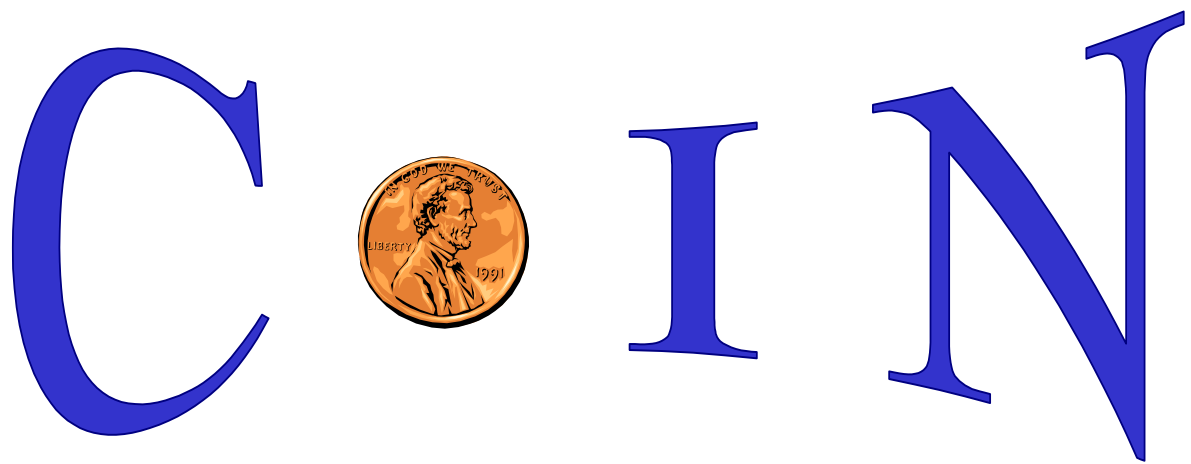


# Constitutional Officer Information Network



## *Budget Request Guide*

*Directors of Finance*

**Compensation Board  
December 1, 2022**

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## 1. COIN MAIN MENU

MAIN-A COIN MAIN MENU 10/27/2009 10:51  
V.05122009 LOC: 059 OFF: 717 FAIRFAX COUNTY

1. SYSTEM MAINTENANCE
2. BUDGET REQUEST PROCESSING
3. REIMBURSEMENT PROCESSING
4. PERSONNEL PROCESSING
5. REPORTS
6. INQUIRY
7. TTF BUDGET REQUEST TTF FISCAL YEAR 2010
8. UPDATE LOCALITY/OFFICE INFORMATION
9. SHERIFFS CERTIFICATION PROGRAM

OPTION: =

BROADCAST MESSAGES:

F1=HELP F12=LOGOFF

4B :00.1 13/10

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start | Inbox - Microsoft Out... | 1 Reminder | Directors of Finance | Directors of Finance ... | TSOSNIP - EXTRA! X-...

- Select Option #2 “Budget Request Processing”

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)**



## **2. Main Menu - Option #2, Budget Request (OLB) Menu**

### **Purpose:**

The Budget Request menu is accessed from the COIN main menu. All Budget Request functionality will be accessed through this menu. A user may choose to view the Permanent Personnel data sorted by Last Name, or Position Number. The user may also select a starting value whereby the Permanent Personnel screen will display the record requested or the next record in the sort sequence if the requested record was not found.

### **Navigational Path**

- Coin Main Menu – Select Option #2, COIN Budget Request

### **DIRECTORS OF FINANCE**

MCB0 COIN BUDGET REQUEST 2009-10-27 10:52  
V.10272007 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY  
OFFICE: DIRECTOR OF FINANCE OFFICER: BRUCE  
BUDGET REQUEST MENU

1. PERMANENT PERSONNEL SORTED BY  
    - LAST NAME OR STARTING LAST NAME: \_\_\_\_\_  
    - POSITION NUMBER OR STARTING POSITION NUMBER: \_\_\_\_\_  
    ENTER "X" FOR SORT ORDER ONLY

2. ADDITIONAL EMPLOYEE REQUEST  
3. TEMPORARY PERSONNEL FUNDING REQUEST  
4. FULL OR PARTIALLY FUNDED PERSONNEL  
5. OFFICE EXPENSE FUNDING  
6. EQUIPMENT (EXCLUDING CLERKS)  
7. RECORD WORKLOAD INFORMATION

9. SPECIAL PROGRAM CERTIFICATION  
10. CERTIFY BUDGET REQUEST  
11. COMMENTS  
12. COMPENSATION BOARD FUNCTIONS  
OPTION =

F1=HELP F3=MENU F4=TOTALS F12=MAIN

48 :00.2 22/09

### **Helpful Hints:**

- COIN Budget Request Menu provides access to other related screens
- Locality and office code will be displayed by COIN when you log into the COIN system
- 'FY' - The upcoming fiscal year will be pre-filled on your COIN Budget Request Menu
  - ✓ If you wish to view a prior fiscal year's Budget Request, type over the supplied fiscal year
- If the required fields have not been completed, the system will not allow you to certify your Budget Request

### **Compensation Board**

Last Updated: 11/30/2022 @8:26 PM

### Budget Request Menu

MCB0 COIN BUDGET REQUEST 2009-10-27 10:52  
V.10272007 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY  
OFFICE: DIRECTOR OF FINANCE OFFICER: BRUCE  
BUDGET REQUEST MENU

1. PERMANENT PERSONNEL SORTED BY
  - \_ LAST NAME OR STARTING LAST NAME: \_\_\_\_\_
  - \_ POSITION NUMBER OR STARTING POSITION NUMBER: \_\_\_\_\_
ENTER "X" FOR SORT ORDER ONLY
2. ADDITIONAL EMPLOYEE REQUEST
3. TEMPORARY PERSONNEL FUNDING REQUEST
4. FULL OR PARTIALLY FUNDED PERSONNEL
5. OFFICE EXPENSE FUNDING
6. EQUIPMENT (EXCLUDING CLERKS)
7. RECORD WORKLOAD INFORMATION
9. SPECIAL PROGRAM CERTIFICATION
10. CERTIFY BUDGET REQUEST
11. COMMENTS
12. COMPENSATION BOARD FUNCTIONS

OPTION =

F1=HELP F3=MENU F4=TOTALS F12=MAIN

48 :00.2 22/09

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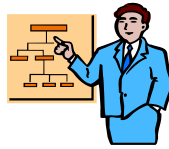
### Helpful Hints (Continued):

- The 'Last Name' sort is the default sort option if no sort option is selected or no partial entry is found
  - ✓ The user may enter an 'X' in the 'Last Name' sort field to start at the 1<sup>st</sup> name listed alphabetically for your office, or
  - ✓ Tab to the 'Starting Last Name' field and input the Last Name of the employee you choose to start the sort
  - ✓ If a starting point or partial initial selection is selected but not found, the Permanent Personnel screen will be displayed starting at the next closest record
  - ✓ Only one sort order option or full/partial starting key may be chosen
- Screen selections #2 through #11 are accessed by entering the choice into the "Option" field in the lower left hand corner of the screen
  - ✓ Invalid option will result in an error message.

### Procedures:

- Select an 'Option' \_\_\_\_
  - ✓ If Option #1, Permanent Personnel, input 'X' next to the sort order you want to view
- 'F' Function Hot Keys allow back and forth movement between commonly used screens
- Press 'F3' or 'F12' to exit the screen to the COIN Main Menu

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)**



### 3. Option #1, Permanent Personnel

**Purpose:**

The Permanent Personnel Request Screen is accessed from the COIN Budget Request menu. This screen allows the user to review and update the Permanent Personnel for the Budget Request. The user may update the Local Salary, Salary Amount Requested and Class Change. The Compensation Board (CB) may update Annual Salary, Salary Amount Requested and Class fields. Totals for various fields may be accessed from this screen.

**Navigational Path:**

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #1, Permanent Personnel

**DIRECTORS OF FINANCE**

TSOSNP - EXTRA! X-treme									
<div> <div>MCB1</div> <div>COIN BUDGET REQUEST</div> <div>2009-10-27 10:54</div> </div> <div> <div>V.01162009</div> <div>FY: 2010</div> <div>LOC: 059</div> <div>OFF: 717</div> <div>FAIRFAX COUNTY</div> </div>									
PERMANENT PERSONNEL SORTED BY LAST NAME									
CHG	POS	SSN	LAST NAME	FIRST NAME					
		ANNUAL	LOCAL	SALARY	AMT REQ	SALARY	REIMB	CLASS	CLASS
		APPROVED	SALARY	SUPPL	ABOVE	AMT REQ	SAL AMT		CHANGE
00084		*****2259	AKARI	HIBA					
		19856	48241	28385	0	19856	9928	DI	
		19856	48241	28385	0	19856	9928	DI	
00116		*****5924	ALMANSA	MELIDA					
		28830	46403	17573	0	28830	14414	DI	
		28830	48492	19662	0	28830	14414	DI	
00050		*****5712	AMEY	DAVID					
		26379	107693	81314	17679	44058	22029	DI	CDIII
		30335	107693	77358	0	30335	15167	DIV	
TOTAL									0148
BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED									
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN									
<div> <div>4B</div> <div>:02.2</div> <div>01/01</div> </div>									
<div> <div>Connected to host: dhtms2.state.va.us [165.176.127.4] (CP03258)</div> <div>Keys: 209280 Saved: 0023 INJMI 10:56 AM</div> </div>									

## Option #1, Permanent Personnel

MCB1  
V.01162009 FY: 2010 LOC: 059 COIN BUDGET REQUEST 2009-10-27 10:57  
OFF: 717 FAIRFAX COUNTY

PERMANENT PERSONNEL SORTED BY POSITION NUM

CHG	POS	SSN ANNUAL APPROVED	LAST NAME LOCAL SALARY	FIRST NAME	SALARY SUPPL	AMT REQ ABOVE	SALARY REIMB	CLASS	CLASS CHANGE
	00001	*****1066	OH	MI SOOK					
		39364	55330		15966	0	39364	19682	DIII
		39364	55330		15966	0	39364	19682	DIII
	00002	*****9479	PATEL	HARISH					
		25226	42924		17698	0	25226	12613	DII
		25226	42924		17698	0	25226	12613	DII
	00003	*****5109	ESCOBAR	LILY					
		24671	42139		17468	0	24671	12335	DII
		24671	42139		17468	0	24671	12335	DII
									TOTAL 0148

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN

01/01

### Helpful Hints:

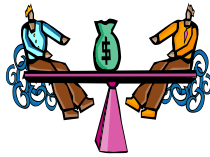
- Option #1, Permanent Personnel screens display salaries for all CB funded employees
- This screen displays each position record for your office
  - ✓ If needed, multiple screens will be displayed to view all position records for your office
- If salary adjustments are made to the 'Salary Amount Requested', COIN will calculate the difference from the annual CB salary approved and place the difference in the amount requested above field
- Personnel changes (CB10s) processed during the time period that the online budget system is available to your office will automatically update personnel and salary data in COIN
  - ✓ The processing of a CB10 could eliminate any salary increase and/or change requests previously entered on this screen for the affected position if the officer has not yet signed off on the completed budget request
- The following codes may be listed in the 'CHG' data field
  - ✓ Blank Space = No CB10 action taken
  - ✓ 'C' = CB10 Change
- If the type of request entered for the affected position prior to the personnel change is still desired after the personnel change, the request must be re-entered on the Permanent Personnel Screen in Budget Request prior to sign off by the officer

### PROCEDURES:

<b>Annual Approved:</b>	Supplied by CB (Can be changed by CB)
<b>Local Salary:</b>	Enter the <u>total salary</u> for each position, including the locality supplement if applicable. If no local supplement funded press Enter and CB Annual Approved Salary will be used.
<b>Salary Suppl:</b>	Calculated for you = Total Locality amount minus the Compensation Board Approved Salary gives you the salary Supplement
<b>Amt Req Above:</b>	Calculated for you = Salary Amount Requested – Annual CB Salary gives you amount requested above
<b>Sal Amt Req:</b>	Entered by Officer or Compensation Board
<b>Reimb Sal Amt:</b>	This will appear with the % amount reimbursed.
<b>Class:</b>	Supplied by system
<b>Class Change:</b>	Enter the class you are requesting for a salary alignment for the employee currently in this position. (Do Not Enter A CB10 For This Request)

- After all data has been entered on all the Permanent Personnel screens, press the "Enter" key to update
- Press 'F8' to proceed to the next page
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office





## 4. Option #2, Additional Personnel Request

### Purpose:

Additional Personnel Request Screen is accessed from the COIN Budget Request menu. This screen will allow the User to Request Additional Personnel. The User may request additional personnel by Class type.

### Navigational Path:

- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request

TSOSNP - EXTRA! X-treme

MCB2 COIN BUDGET REQUEST 2009-10-27 11:03  
V.01202008 FY: 2010 LOC: 003 OFF: 717 ALBEMARLE COUNTY

ADDITIONAL PERSONNEL REQUEST

CLASS	ENTRY LEV SAL	NUM OF POSITIONS	TOTAL AMT REQ
CTII	19856 *	0	0
	19856	0	0
DI	19856 *	3	59,568
	19856	3	59,568
FA	19856 *	0	0
	19856	0	0
GC	19856 *	2	39,712
	19856	2	39,712
SECI	19856 *	0	0
	19856	0	0

TOTAL  
0005

BUDGET HAS BEEN SIGNED OFF YOU CANNOT MODIFY  
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

4B :00.1 08/25

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### Helpful Hints:

- Complete this section to request additional full-time CB funded positions of a predefined class, or
- Complete this section to request additional full-time CB funded positions other than a predefined class
- Blank data fields (Class, Entry Level Salary and Number of positions) are provided to enter request for Additional Personnel other than pre-listed CB classes and/or salaries
- COIN calculates the total amount for each class based on the number of positions requested
- 'Number of Positions' fields **are required**, you must enter a '0' or the number of additional full-time CB funded positions requested

## CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

- Any new positions approved by the General Assembly or any reallocated positions will be allocated by the Compensation Board based upon the request and in accordance with the Compensation Board's staffing standards.
- Valid Class must be entered; salary request must be between minimum and maximum of pay band of class requested

### Option #2, Additional Personnel Request

MCB2 COIN BUDGET REQUEST 2009-10-27 11:03  
V.01202008 FY: 2010 LOC: 003 OFF: 717 ALBEMARLE COUNTY

ADDITIONAL PERSONNEL REQUEST

CLASS	ENTRY LEV SAL	NUM OF POSITIONS	TOTAL AMT REQ
CTII	19856 *	0	0
	19856	0	0
DI	19856 *	3	59,568
	19856	3	59,568
FA	19856 *	0	0
	19856	0	0
GC	19856 *	2	39,712
	19856	2	39,712
SECI	19856 *	0	0
	19856	0	0
			TOTAL 0005

BUDGET HAS BEEN SIGNED OFF YOU CANNOT MODIFY  
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

48 :00.1 08/25

### Procedures:

#### Class:

Supplied by CB. If the supplied class is not the class you wish to add, tab to the blank field under the class column and input the class code you wish to request. Valid CB Class must be entered, if unknown, see the salary scales in the appendix.

#### Entry Level

Supplied by CB. If the supplied salary is not the salary you wish to request, tab to the blank field under the 'Entry Level' column and enter the salary you wish to request

#### Number of Positions:

Enter the number of positions you are requesting

#### Blank Fields (Other)

Enter Class, Salary and number of positions requested

- Press the "Enter" key after completing the information requested
- Press "F8" to proceed to the next screen
- Press 'F3=Exit' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



## 5. Option #3, Temporary Personnel Fund Request

### Purpose:

Temporary Personnel Request Screen is accessed from the COIN Budget Request menu. The Temporary Personnel Request Screen allows the user to review or update the total dollar amount requested for the Temporary Personnel funding in the Budget request.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #3, Temporary Personnel Request

DIRECTORS OF FINANCE			
MCB3		COIN BUDGET REQUEST	
V.01202008		2010-10-25 11:52	
FY: 2012	LOC: 003	OFF: 717	ALBEMARLE COUNTY
TEMPORARY PERSONNEL FUNDING REQUEST			
BASE AMOUNT APPROVED	TOTAL REQUESTED	AMOUNT REQUESTED ABOVE/ BELOW	
64	64	0	
<p>F1=HELP      F3=MENU      F4=TOTALS      F9=FUNDING      F12=MAIN</p> <p>10/33</p>			

### Helpful Hints:

- The budgeted amount for the prior fiscal year for Temporary Employee funding is displayed in 'Base Amount Approved' column
- The 'Total Requested' data field should reflect your total request needed for Temporary Personnel funding

## CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

- ✓ If no additional funds are needed above the 'Base Amount Approved', enter in the 'Base Amount Approved' as your total request for Temporary Personnel
- ✓ If additional or reduced funding is reflected in the 'Total Request' data field, the 'Amount Requested Above/Below' will be recalculated
- Check the Base Amt Approved to your Original July 1 Approved Budget to make sure that fund transfers approved during the current year are not included in this figure, unless the approved Compensation Board minutes state that this a Base Budget Adjustment

### Option #3, Temporary Personnel Fund Request

The screenshot shows a terminal window titled "VITA1 - Rick - EXTRA! X-treme". The main window displays the "COIN BUDGET REQUEST" screen. At the top, it shows "MCB3" and "2010-10-25 11:52". Below this, it displays "V.01202008 FY: 2012 LOC: 003 OFF: 717 ALBEMARLE COUNTY". The title "TEMPORARY PERSONNEL FUNDING REQUEST" is centered. Below the title, there is a table with three columns: "BASE AMOUNT APPROVED", "TOTAL REQUESTED", and "AMOUNT REQUESTED ABOVE/ BELOW". The values are: "64", "64", and "0" respectively. At the bottom of the screen, there are function key prompts: "F1=HELP", "F3=MENU", "F4=TOTALS", "F9=FUNDING", and "F12=MAIN". The bottom status bar shows "Connected to host dltmvs2.state.va.us [165.176.127.4] (CIP0052C)", "Keys: 479770 Saved: 0025", "NUM", and "11:53 AM".

BASE AMOUNT APPROVED	TOTAL REQUESTED	AMOUNT REQUESTED ABOVE/ BELOW
64	64	0

### Procedures:

**Base Amt Approved:** Supplied by COIN  
**Total Req:** Enter your 'Total Request' for temporary funding  
**Amt Req Above/Below:** This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



**Helpful Hints:**

- This screen should be used to enter salary information of positions fully or partially funded by the Compensation Board, the Locality or other sources
- This does not include positions identified as current permanent employees under Option #1, which may be supplemented by another source
- Upon entry of the required fields, the system will calculate the fund amount for each person and the total funds for your office
- For each temporary employee for whom reimbursement will be requested from CB approved temporary personnel funding, last name, first name, class, hourly rate, planned number of hours to be reimbursed for the fiscal year and the source(s) of funding for the personnel must be provided
  - ✓ If employee is Unknown, key 'Vacant' in the 'Last Name' data field
  - ✓ Annual hours cannot exceed 2,080 per individual
  - ✓ Enter "X" in at least one fund source field
  - ✓ 'X' may be entered in as many of the Fund Source fields as are applicable for that record

### Option #4, Fully Or Partially Funded Positions

[illegible]

### Procedures:

<b>Del:</b>	Enter 'D' to delete entry
<b>Last Name:</b>	Enter the employee's last name; if Vacant, type "Vacant"
<b>First Name:</b>	Enter the employee's first name if known; if 'Vacant' this data field may be left blank because the system will look for 'Vacant' in the 'Last Name' data field
<b>Class:</b>	Enter the employee's class (Does not have to be a CB classification)
<b>Hourly Rate:</b>	Enter the employee's hourly wage rate
<b>Annl Hours:</b>	Enter the total number of hours worked <u>annually</u>
<b>Tot Funds:</b>	This field will be calculated for you
<b>CB:</b>	Enter "X", if employee is partially or fully funded by the CB from temporary personnel funds
<b>Loc:</b>	Enter "X", if employee is partially or fully funded by the Locality
<b>Fed:</b>	Enter "X", if employee is partially or fully federally funded
<b>Other:</b>	Enter "X", if employee is partially or fully funded by other sources

- Press the “Enter” key after completing the information requested
- Press ‘F8’ for next blank page when applicable
- Press ‘F3’ to exit the screen to the Budget Request Menu



## 7. Option #5, Office Expense Funding Request

### Purpose:

Office Expense Funding Request is accessed from the COIN Budget Request menu. The Office Expense screen allows the user to review or update the total dollar amount requested for the Office Expense Budget request.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #5, Office Expense Funding Request

DIRECTORS OF FINANCE			
<div>TSOSHIP - EXTRA X-treme</div> <div> <div>MCB5</div> <div>COIN BUDGET REQUEST</div> <div>10/27/2009 11:11</div> </div> <div> <div>V.11052008</div> <div>FY: 2011</div> <div>LOC: 003</div> <div>OFF: 717</div> <div>ALBEMARLE COUNTY</div> </div> <div>OFFICE EXPENSE FUNDING REQUEST</div> <div>           STATIONERY, OFFICE SUPPLIES, PRINTING (FORMS AND LETTERS)            POSTAGE/BOX RENTAL, TELEPHONE (TAX EXCLUDED),            REPAIRS TO OFFICE FURNITURE AND EQUIPMENT,            OTHER NECESSARY EXPENSES INCLUDING ASSOCIATION DUES         </div> <div> <div>BASE AMT</div> <div>TOTAL</div> <div>AMT REQ</div> </div> <div> <div>APPROV</div> <div>REQ</div> <div>ABOVE/</div> <div>BELOW</div> </div> <div> <div>OFFICER AMTS</div> <div>CB AMTS</div> </div> <div> <div>F1=HELP</div> <div>F3=EXIT</div> <div>F4=TOTALS</div> <div>F12=MAIN</div> </div> <div> <div>4B</div> <div>:00.3</div> <div>01/01</div> </div>			

### Helpful Hints:

- The total office expenses for the prior year will be displayed as your 'Base Amount Approved'
- This screen allows you to request an increase or decrease to your office expense funding or retain the same amount in the "Total Request" field
- COIN will recalculate the 'Amount Requested Above/Below' based on the 'Total Request' entered
- Participation of the Compensation Board in Office Expenses is limited to certain items as provided by the Code of Virginia (1950), as amended
  - ✓ Any additions or transfers made during the current fiscal year may be included in the supplied figures
  - ✓ Check the supplied amount to the original Compensation Board approved Budget, or CB approved minutes for changes affecting the base budget.



## Option #5, Office Expense Funding

TSOSNIP - EXTRA! X-treme

MCB5 COIN BUDGET REQUEST 10/27/2009 11:11  
 V.11052008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

OFFICE EXPENSE FUNDING REQUEST

STATIONERY, OFFICE SUPPLIES, PRINTING (FORMS AND LETTERS)  
 POSTAGE/BOX RENTAL, TELEPHONE (TAX EXCLUDED),  
 REPAIRS TO OFFICE FURNITURE AND EQUIPMENT,  
 OTHER NECESSARY EXPENSES INCLUDING ASSOCIATION DUES

	BASE AMT APPROV	TOTAL REQ	AMT REQ ABOVE/ BELOW
OFFICER AMTS			
CB AMTS			

F1=HELP F3=EXIT F4=TOTALS F12=MAIN

48 :00.3 01/01

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start Inbox - Microsoft Out... 1 Reminder Directors of Finance Directors of Finance TSOSNIP - EXTRA! X-treme

### Procedures:

- Press the "TAB" key to go to the next field of entry

**Base Amt Approved:**

Supplied by COIN

**Total Request:**

Enter your 'Total Request' for office expense funding

**Amt Req Above/Below Approved:** This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



## 8. Option #6, Equipment

### Purpose:

Equipment Request Screen is accessed from the COIN Budget Request menu. Requests for Equipment are made by Category and costs are calculated by quantity.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment

### Helpful Hints:

- The system will calculate the total amount for each equipment item requested and the total amount for all items for your office
- These screens allow the user to request Information Technology (IT) equipment items along with the unit cost and quantity
- NOTE: The Compensation Board may require justification for these items upon review of your budget request.

## Option #6, Equipment

The screenshot shows a terminal window titled "VITA1 - Rick - EXIRAI X frame". The main window displays the "COIN BUDGET REQUEST" screen. At the top, it shows "MCB4" and "10/25/2010 12:06". Below this, it says "V.04162008 FY: 2012 LOC: 153 OFF: 717 PRINCE WILLIAM COUNTY". The screen is titled "EQUIPMENT REQUEST". Under "SEL CATEGORY:", it shows "A INFO TECHNOLOGY". Below this, there is a table with columns: NEW UNIT, NEW COST, NEW QTY, TOT COST, RPL UNIT, RPL COST, RPL QTY, TOT COST, TOT QTY, TOTAL COST, and STRESSED COST. The first row shows "DESC: LAPTOP" with values: NEW UNIT 1200, NEW QTY 1, TOT COST 1200, RPL UNIT 1, RPL COST 1200, TOT QTY 1, TOTAL COST 1200, and STRESSED COST 627.00. The second row shows "DESC: P C" with values: NEW UNIT 700, NEW QTY 1, TOT COST 700, RPL UNIT 1, RPL COST 700, TOT QTY 1, TOTAL COST 700, and STRESSED COST 366.00. Below the table, it says "RECORD UPDATED SUCCESSFULLY" and "F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN". At the bottom, it shows "11/09" and "Connected to host dttms2.state.va.us [165.176.127.4] (CIP0052C)".

### Procedures:

- User will select and input the equipment category they wish to request
  - ✓ Category 'A', IT Equipment
  - ✓ Category 'B', Office Equipment
  - ✓ Category 'C', Furniture
- To proceed to your next equipment category, enter in your next 'SEL CATEGORY'

<b>DESC:</b>	List requested equipment or utilize the 'F1' help function
<b>New Unit Cost:</b>	Enter unit cost of the new equipment requested
<b>New Qty:</b>	Enter the quantity here, if this is New equipment not presently owned
<b>New Total Cost:</b>	Calculated
<b>RPL Unit Cost:</b>	Enter unit cost of the replacement equipment requested
<b>RPL Qty:</b>	Enter the quantity here, if this is Replacement equipment for existing equipment being replaced
<b>RPL Total Cost:</b>	Calculated
<b>Total Qty:</b>	Calculated (New + Replacement)
<b>Total Cost:</b>	Calculated (New + Replacement)
<b>Stressed Cost:</b>	Calculated (See Operating Manual)

- Press the "Enter" key after all required information has been entered
- Press 'F8= Next' key to proceed to the next screen if additional screens are needed for your equipment request
- Press 'F3 = Exit' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

## Option #6, Equipment

### DIRECTORS OF FINANCE

#### Category A – Information Technology (It) Equipment

MCB4 COIN BUDGET REQUEST 10/25/2010 12:06  
V.04162008 FY: 2012 LOC: 153 OFF: 717 PRINCE WILLIAM COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: A INFO TECHNOLOGY

NEW UNIT	NEW COST	NEW QTY	NEW TOT COST	RPL UNIT	RPL COST	RPL QTY	RPL TOT COST	TOT QTY	TOTAL COST	STRESSED COST
DESC: LAPTOP				1200		1	1200	1	1200	627.00
DESC: P C										
700		1	700					1	700	366.00
DESC:										

RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

12/13

#### Category B – Office Equipment

MCB4 COIN BUDGET REQUEST 10/27/2009 11:15  
V.04162008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: B OFFICE EQUIPMNT

NEW UNIT	NEW COST	NEW QTY	NEW TOT COST	RPL UNIT	RPL COST	RPL QTY	RPL TOT COST	TOT QTY	TOTAL COST	STRESSED COST
DESC: _____										
DESC: _____										
DESC: _____										

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

11/09

## Option #6, Equipment

**DIRECTORS OF FINANCE**

**Category C – Furniture Equipment**

MCB4 COIN BUDGET REQUEST 10/27/2009 11:16  
V.04162008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: C FURNITURE

NEW UNIT	NEW COST	NEW QTY	NEW TOT COST	RPL UNIT	RPL COST	RPL QTY	RPL TOT COST	TOT QTY	TOTAL COST	STRESSED COST
DESC: _____										
DESC: _____										
DESC: _____										

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

4B :00.1 11/09

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CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)



## 9. Option #7, Record Workload Information

### Purpose:

The Record Workload Information menu is accessed from the Budget Request menu. Users can select the frequency for recording workload information.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #7, Record Workload Information

A screenshot of a computer screen displaying the COIN BUDGET REQUEST menu. The screen is titled "TSOSHP - EXTRAI X frame". At the top, it shows "MCB6 COIN BUDGET REQUEST 10/27/2009 11:17" and "V.11052008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY". The main menu is titled "RECORD WORKLOAD INFORMATION" and asks the user to "SELECT RECORDING FREQUENCY OF WORKLOAD INFORMATION:". There are three options listed: "1. MONTHLY", "2. QUARTERLY", and "3. ANNUALLY". Below the options, it says "CALENDAR YEAR: 2009". At the bottom, it says "OPTION: 3". There are also function keys listed: "F1=HELP", "F3=MENU", "F4=TOTALS", and "F12=MAIN". The screen is running on a Windows XP desktop with a taskbar at the bottom showing various applications and the system clock.

- In January, offices must record one full year of workload data for the most recent Calendar Year.
  - Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
  - Select 'Option 3' and press the "Enter" key to proceed to the next screen
  - The Workload Measures screens must be processed and an amount must be entered for each workload measure for the most recent ending calendar year
    - ✓ The screens will also display the amounts for the previous two calendar years
    - ✓ Enter the number of transactions for each workload measure listed; if not applicable, to your office enter '0', and "TAB" to the next field
    - ✓ **Do Not Leave Blanks** or the system will default the item to zero
  - Press 'F3=Exit' to exit the screen to the Budget Request Menu
  - 'F12=Main' returns you to the COIN Main Menu
- The following pages display the individual Workload Measures by program that must be completed

## Option #7 Record Workload Information

### Option #3 Annual Screens

Screen 1 of 11

The screenshot shows a terminal window titled "VITA1 - Rick - EXTRA! X-treme". The main window displays the "COIN BUDGET REQUEST" screen for user "MCBH-D" on "10/25/2010 12:20". The screen shows the following information:

V.03152010 FY: 2012 LOC: 510 OFF: 717 ALEXANDRIA CITY

RECORD WORKLOAD INFORMATION - ANNUALLY  
CALENDAR YEAR 2010

1. REAL ESTATE TAXES BILLED PER YR 2  
DUE DATES REAL ESTATE TAXES 0615 1115

2. REFER LOCAL ESCHEATOR (Y/N) Y

3. VEHICLE BILL TYPE (SINGLE/COMBO) SINGLE

4. NUMBER OF TIMES PERSONAL PROPERTY BILLED PER YEAR 1  
DUE DATES PERSONAL PROPERTY 1005 0000 0000 0000

5. PERSONAL PROPERTY PRORATED Y

6. NUMBER TIMES DELINQUENT STATE INCOME TAX BILLED PER YEAR 0  
REMINDER NOTICES SENT? (Y/N) N

7. UNCLAIMED PROPERTY REPORT FILED? (Y/N) Y

At the bottom, there are function key prompts: F1=HELP, F3=MENU, F8=NXT, and F12=MAIN. The status bar shows "07/63" and "01.6".

1. Enter the number of times per year Real Estate Taxes are billed and the month and year of the due date(s)
2. Enter 'Y' or 'N' for Refer Local Escheator
3. Enter the type of vehicle bill (either single or combo)
4. Enter the number of times per year Personal Property Taxes are billed and month and year of the due date(s)
5. Enter 'Y' or 'N' for Prorated Personal Property Tax
6. Enter the number of times per year Delinquent State Income Tax is billed and 'Y' or 'N' for Reminder Notices sent
7. Enter 'Y' or 'N' for Unclaimed Property Report Filed

## Option #7 Record Workload Information

## Option #3 Annual Screens

Screen 2 of 11

VITA1 - Rick - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/25/2010 12:21  
V.03152010 FY: 2012 LOC: 510 OFF: 717 ALEXANDRIA CITY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2008	2009	2010	AVG
<b>REAL ESTATE TAX:</b>				
1. TAXABLE PARCELS	43529	43635		43582
2. LAND PARCELS MAINTAINED FOR MORTGAGE COS	27686	27773		27730
3. REAL ESTATE ABATEMENTS	1011	4720		2866
4. REAL ESTATE TAX BILLS PROCESSED PER YEAR	91346	91477		91412
5. REAL ESTATE TRANSFERS	3684	3648		3666
6. REAL ESTATE PARCELS IN RELIEF	2108	1274		1691
7. PARCELS IN THE LAND USE PROGRAM	0	0		0
<b>PERSONAL PROPERTY:</b>				
8. PERSONAL PROPERTY IN RELIEF	221	193		207
9. PERSONAL PROPERTY ITEMS	113132	120796		116964
10. PERSONAL PROPERTY TAX BILLS PROCESSED	187158	198755		192957
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT	17783	15105		16444
12. PERSONAL PROPERTY ABATEMENTS	211692	208174		209933
<b>DOG LICENSES:</b>				
13. NUMBER OF DOG LICENSES SOLD	3007	2983		2995

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

08/63

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start Microsoft Office 2007 Windows Explorer Microsoft Excel Directors of Finance 12:21 PM

## Real Estate:

1. **NUMBER OF TAXABLE PARCELS:** If your office handles the collection of real estate, enter the total number of parcels of taxable real estate.

**INCLUDE:**

Parcels billed on the regular book, Supplements, Roll back assessments on land use.

DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'.

2. **NUMBER OF PARCELS MAINTAINED FOR MORTGAGE COMPANIES:** If your office handles the collection of real estate, enter the total number of parcels that you maintain for mortgage companies. This includes the accounts that are maintained on the computer and processed by tape and those that are manually processed for the mortgage companies.
3. **NUMBER OF REAL ESTATE ABATEMENTS:** If your office handles the collection of real estate, enter the total number of parcels adjusted during the year.
4. **NUMBER OF REAL ESTATE TAX BILLS PROCESSED PER YEAR:** If your office handles the collection of real estate, enter the total number of real estate tax bills mailed by your office. INCLUDE the regular book, semi-annual billing, supplements, and bills resulting from new construction. If your office DOES NOT handle the collection of real estate ENTER '0'.
5. **NUMBER OF REAL ESTATE TRANSFERS:** If your office handles the collection of real estate, enter the number of parcels transferred for the year. If your office DOES NOT handle the collection of real estate ENTER '0'.
6. **NUMBER OF REAL ESTATE PARCELS IN RELIEF TO THE ELDERLY/DISABLED PROGRAM:** If your office handles the collection of real estate, enter the total number of parcels with a tax adjustment due to participation in the elderly/disabled program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'.



## Option #7 Record Workload Information

### Option #3 Annual Screens

MCBH-F COIN BUDGET REQUEST 10/25/2010 12:21  
V.03152010 FY: 2012 LOC: 510 OFF: 717 ALEXANDRIA CITY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2008	2009	2010	AVG
<b>REAL ESTATE TAX:</b>				
1. TAXABLE PARCELS	43529	43635		43582
2. LAND PARCELS MAINTAINED FOR MORTGAGE COS	27686	27773		27730
3. REAL ESTATE ABATEMENTS	1011	4720		2866
4. REAL ESTATE TAX BILLS PROCESSED PER YEAR	91346	91477		91412
5. REAL ESTATE TRANSFERS	3684	3648		3666
6. REAL ESTATE PARCELS IN RELIEF	2108	1274		1691
7. PARCELS IN THE LAND USE PROGRAM	0	0		0
<b>PERSONAL PROPERTY:</b>				
8. PERSONAL PROPERTY IN RELIEF	221	193		207
9. PERSONAL PROPERTY ITEMS	113132	120796		116964
10. PERSONAL PROPERTY TAX BILLS PROCESSED	187158	198755		192957
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT	17783	15105		16444
12. PERSONAL PROPERTY ABATEMENTS	211692	208174		209933
<b>DOG LICENSES:</b>				
13. NUMBER OF DOG LICENSES SOLD	3007	2983		2995

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

7. **NUMBER OF PARCELS IN THE LAND USE PROGRAM:** If your office handles the collection of real estate, enter the total number of parcels with a tax adjustment due to participation in the land use program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'.

#### Personal Property:

8. **NUMBER OF PERSONAL PROPERTY ITEMS IN RELIEF TO THE ELDERLY/DISABLED PROGRAM:** If your office handles the collection of personal property, enter the total number of personal property items with a tax adjustment due to participation in the elderly/disabled program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of personal property, ENTER '0'.
9. **NUMBER OF ITEMS ON WHICH PERSONAL PROPERTY TAX IS ASSESSED EACH YEAR:** If your office handles the collection of personal property, include the total number of items of personal property assessed. Count each separate motor vehicle, trailer, boat and motor, camper, travel trailer, aircraft, mobile home and each assessment of machinery and tools, business personal property, and farm accounts that are assessed. Each item is a separate count. (If you bill on a combined bill you may have to verify this number with your Commissioner of the Revenue – This should equal the total of factors #4, #5, and #6 on the workload study for the Commissioner) INCLUDE regular assessments as determined above for the year and all supplemental assessments. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of personal property, ENTER '0'.
10. **NUMBER OF PERSONAL PROPERTY TAX BILLS PROCESSED PER YEAR:** If your office handles the collection of personal property, enter the total number of personal property tax bills mailed by your office. INCLUDE the regular book, semi-annual billing, supplements, and bills resulting from proration. If your office DOES NOT handle the collection of personal property ENTER '0'.
11. **NUMBER OF PERSONAL PROPERTY ADDRESS CHANGES UPDATED:** If your office handles personal property address changes, enter the total number of addresses updated during the year. INCLUDE the total number of addresses updated based on your "skip-tracing" efforts. If your office DOES NOT handle the updating of addresses, ENTER '0'.
12. **NUMBER OF PERSONAL PROPERTY ABATEMENTS:** If your office handles the collection of personal property, enter the total number of personal property items adjusted during the year. INCLUDE the total number of refunds or adjustments to accounts resulting from proration of personal property taxes.

#### Dog Licenses:

13. **NUMBER OF DOG LICENSES SOLD:** Enter the total number of licenses issued during the year.

## Option #7 Record Workload Information

### Option #3 Annual Screens

Screen 3 of 11

TSOSNP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:22  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
14. DOG LICENSE NOTICES		5504		5504
15. RABIES CERT SENT TO OTHER LOCALITIES		1812		1812
COLLECTION ACTIONS:				
16. WARRANTS IN DEBT ISSUED	16233	18058		17146
17. WARRANTS IN DEBT ISSUED	1497	1600		1549
18. PARCELS IN JUDICIAL SALES	65	60		63
19. LIENS ISSUED (BANK, WAGE & 3RD PARTY)	203	234		219
20. TREASURERS' SUMMONS	0	0		0
21. DISTRESS ACTIONS TO SEIZE PROPERTY	0	0		0
22. DELINQUENT NOTICES -- REAL ESTATE & PER	159719	192434		176077
23. DMV STOPS ISSUED	143	9616		4880
24. MON PAY PLANS FOR TAX/DELINQ COLLECT	54	55		55
25. MEAL TAX ENFORCE ACTIONS BY DISTRESS	0	0		0
26. OTHER COLLECTIONS	0	99		50
FEES, PERMITS, AND OTHER LICENSES:				
27. VEHICLE DECALS ISSUED	100899	16432		58666

I0048 RECORD UPDATED SUCCESSFULLY

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

48 :00.2 07/63

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start [Icons] [Taskbar] [System Tray] [Clock: 11:24 AM]

14. **DOG LICENSE NOTICES**: Enter the number of dog license notices processed (Include dog tag renewal forms sent)

15. **RABIES CERTIFICATES SENT TO OTHER LOCALITIES**: Enter the number of rabies certificates that were sent to other localities.

#### Collection Actions:

16. **NUMBER OF ACCOUNTS IN DEBT SET OFF PROGRAM BASED ON NUMBER OF CLAIMS FILED**

17. **NUMBER OF WARRANTS IN DEBT ISSUED**

18. **NUMBER OF PARCELS IN JUDICIAL SALE PROCEEDINGS**

19. **NUMBER OF LIENS ISSUED (INCLUDES BANK, WAGE, AND OTHER THIRD PARTY LIENS)**

20. **NUMBER OF TREASURERS' SUMMONS**

21. **NUMBER OF DISTRESS ACTIONS TO SEIZE PROPERTY**

22. **TOTAL OF DELINQUENT NOTICES FOR REAL ESTATE AND PERSONAL PROPERTY**

23. **NUMBER OF DMV STOPS ISSUED**

24. **NUMBER OF MONTHLY PAYMENT PLANS MAINTAINED FOR PREPAYMENT OF TAXES AND DELINQUENT COLLECTIONS (INCLUDE ACH PAYMENTS)**

25. **NUMBER OF MEALS TAX ENFORCEMENT ACTIONS BY DISTRESS**

26. **NUMBER OF OTHER COLLECTIONS**

#### Fees, Permits & Other Licenses

27. **NUMBER OF VEHICLE DECALS ISSUED (INCLUDE ABATEMENTS)**: Enter total number of licenses issued during the year.

## Option #7 Record Workload Information

## Option #3 Annual Screens

Screen 4 of 11

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:24  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
28. OTHER VEHICLE REGISTRATIONS	0	0		0
29. VEHICLE LICENSE FEES BILLED (ABATEMTS)		16072		16072
30. UTILITY BILLS COLLECTED	0	0		0
31. TRASH COLLECTION BILLS COLLECTED	0	0		0
32. ANNUAL TRASH DECALS ISSUED	0	0		0
33. PARKING TICKETS COLLECTED	174	234		204
34. ZONE PERMIT PARKING FEES COLLECTED	0	0		0
35. BUILDING PERMITS PROCESSED	0	2084		1042
36. LOCAL BUSINESS TAX COLLECTED (BPOL)	7932	7977		7955
37. BUSINESS ACCOUNTS W/LOCAL EXCISE TAX	305	295		300
38. UTILITY TAX & CONSUMER UTILITY TAX ACCTS	55	55		55
39. PARKS AND RECREATION FEES PROCESSED	423	824		624
40. OTHER LOCAL BILLS COLLECTED	825	1069		947
STATE TAXES AND OTHER STATE DUTIES:				
41. STATE INCOME TAX MEMORANDA PROCESSED	0	0		0
42. COLLECTION ACTIONS INITIATED	0	0		0

I0048 RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

4B :00.1 07/63

28. **NUMBER OF OTHER VEHICLES**: Enter total number of scooter or moped registrations issued during the year.
29. **NUMBER OF VEHICLE FEES BILLED**: Enter total number of vehicle licenses that were assessed during the year.
30. **NUMBER OF UTILITY BILLS COLLECTED**: Enter total number of water, sewer, and other municipal utility bills collected during the year.
31. **NUMBER OF TRASH COLLECTION BILLS COLLECTED**: Enter total number of trash collection bills processed during the year.
32. **NUMBER OF ANNUAL TRASH DECALS ISSUED**: Enter total number of trash decals or stickers issued during the year.
33. **NUMBER OF PARKING TICKETS COLLECTED**: Enter total number of parking tickets collected during the year.
34. **NUMBER OF ZONE PERMIT PARKING FEES COLLECTED**: Enter total number of zone permit parking fees collected during the year.
35. **NUMBER OF BUILDING PERMITS PROCESSED**: Enter total number of permits collected during the year.
36. **NUMBER OF LOCAL BUSINESSES ON WHICH LICENSE TAX IS COLLECTED (BPOL)**: Enter the total number of businesses from whom you collect a license tax.
37. **NUMBER OF BUSINESS ACCOUNTS ON WHICH LOCAL EXCISE TAX IS COLLECTED**: Enter the total number of meals tax, admissions, cigarette, lodging and other local excise tax accounts from whom you collect a excise tax.
38. **NUMBER OF UTILITY TAX AND CONSUMER UTILITY TAX ACCOUNTS**: Enter the total number of utility and consumer utility tax accounts collected annually. INCLUDE consumer utility and local consumption.
39. **NUMBER OF PARKS AND RECREATION FEES PROCESSED**: Enter total number of transactions processed for parks and recreation activities.
40. **NUMBER OF OTHER LOCAL BILLS COLLECTED**: Enter total number of other local billings invoiced and collected during the year. Examples include stormwater management fees, library fines, EMS billing, false alarm fees, and charges for property damage.

## State Income Tax and Other State Duties:

41. **NUMBER OF STATE INCOME TAX MEMORANDA RECEIVED/PROCESSED**: Enter the number of state income tax memoranda received and processed from the Commissioner of Revenue during the year. INCLUDE those that are paid in full and those with a balance due.
42. **NUMBER OF COLLECTION ACTIONS INITIATED AGAINST STATE INCOME TAX RETURNS**: Enter the total of all collection actions initiated against state income tax accounts. Include warrants issued, tax liens, and all delinquent notices sent for outstanding state income taxes.

## Option #7 Record Workload Information

### Option #3 Annual Screens

Screen 5 of 11

TSOSNP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:35  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
43. ESTIMATED TAX ACCOUNTS	0	0		0
44. ESTIMATED TAX PAYMENTS	107	100		104
45A. NUMBER OF TITLES PROCESSED FOR DMV	0	0		0
46. NUM OF TRANS W/FEEs COLLECTED FOR DMV	0	0		0
FINANCIAL MANAGEMENT:				
47. NUMBER CHECKS/ACH ISSUED	103277	102317		102797
48. RETURNED CHECKS	513	561		537
49. PREPARATION PAYROLL AND ADMINISTRATION	3580	3777		3679
50. BANKRUPTCY CLAIMS FILED	40	90		65
ADJUSTMENTS:				
1.A. TAX ASSESSMENTS ADJUSTED	1818	1670		1744
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	397	415		406
1.C. PERSONAL PROPERTY ASSESSMENTS ADJ	17044	19336		18190
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	2321	2450		2386
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0		0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	6	11		9
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP	F3=MENU	F7=PRV	F8=NXT	F12=MAIN

48 :00.1 07/63

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start Inboxes - Microsoft O... 1 Reminder Rep: Sherman Hollan... Directors of Finance Directors of Financ... TSOSNP - EXTRA! ... 11:36 AM

43. **NUMBER OF ACCOUNTS MAINTAINED ON ESTIMATED STATE INCOME TAX RETURNS:** Enter the total number of accounts maintained on estimated state income tax returns. Include both filed with the Commissioner of the Revenue and accounts not filed.
44. **NUMBER OF ESTIMATED STATE INCOME TAX PAYMENTS COLLECTED:** Enter the total number of payments received in your office during the year. In theory, 4 payments should be collected on each assessment received from the Commissioner of the Revenue that you maintain. Also include the total of payments received on accounts not filed with the Commissioner but processed by your office.
45. **NUMBER OF TITLES PROCESSED FOR DMV AS A DMV LICENSING AGENT:** If your office serves as a DMV Licensing Agent, enter the 1) total number of vehicle titles, (original, substitute and replacement including title maintenance or change of title information); 2) vehicle registration (original, renewal, transfer, re-issue or surrender) transactions; 3) special and personalized license plate requests processed; 4) Driver Transcript Record requests processed. Each item (titles, registrations, plate requests, transcripts) is a separate count.
46. **TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT**

#### Financial Management:

47. **NUMBER OF CHECKS/ACH ISSUED:** Enter the total number of checks/ACH issued during the year. INCLUDE the checks issued from all accounts under the TREASURERS supervision and ACH items listed on bank statements.
48. **RETURNED CHECKS:** Enter the total number of checks returned for insufficient funds, account closed, etc. by your bank(s).
49. **PREPARATION OF PAYROLL AND ADMINISTRATION:** If your office is responsible for the preparation and administration of the county payroll, enter the total number of employees for the year. If your office does not prepare the payroll for the county, please enter '0'.
50. **NUMBER OF BANKRUPTCY CLAIMS FILED:** Enter the total number of bankruptcy claims filed with your office.

## Option #7, Record Workload Information

### Option #3 Annual Screens

TSOSHIP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:35  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
43. ESTIMATED TAX ACCOUNTS	0	0		0
44. ESTIMATED TAX PAYMENTS	107	100		104
45A. NUMBER OF TITLES PROCESSED FOR DMV	0	0		0
46. NUM OF TRANS W/FEEES COLLECTED FOR DMV	0	0		0
FINANCIAL MANAGEMENT:				
47. NUMBER CHECKS/ACH ISSUED	103277	102317		102797
48. RETURNED CHECKS	513	561		537
49. PREPARATION PAYROLL AND ADMINISTRATION	3580	3777		3679
50. BANKRUPTCY CLAIMS FILED	40	90		65
ADJUSTMENTS:				
1.A. TAX ASSESSMENTS ADJUSTED	1818	1670		1744
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	397	415		406
1.C. PERSONAL PROPERTY ASSESSEMENTS ADJ	17044	19336		18190
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	2321	2450		2386
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0		0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	6	11		9
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP	F3=MENU	F7=PRV	F8=NXT	F12=MAIN

4B :00.1 07/63

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#### Adjustments

- A. NUMBER OF REAL ESTATE TAX ASSESSMENTS ADJUSTED:** Enter total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits, and may include the application of tax relief, tax credits, or land use programs.

**B. NUMBER OF BUSINESS LICENSE ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any increase or decrease in the original license fee based on discovery of gross receipts; or in the case of wholesalers, gross purchases. Adjustments may be made after discovery of new receipts, i.e. Schedule C; audits, which require additional information to be provided by the entity; and self-reporting errors.

**C. NUMBER OF PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits. This does not include adjustments that were made to the personal property records prior to generation of the final Personal Property Book.

**D. NUMBER OF BUSINESS PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new property or an error in the original reporting.**

**E. NUMBER OF MERCHANT'S CAPITAL ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new capital or an error in the original reporting.**

**F. NUMBER OF MACHINERY & TOOLS ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new machinery and tools or an error in the original reporting..**



## Option #7, Record Workload Information

### Option #3 Annual Screens

Screen 6 of 11

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	27	11		19
1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTED		16072		16072
<b>AUDITS &amp; APPEALS:</b>				
2. TAX RELIEF APPLICATIONS	518	700		609
3. BUSINESS LICENSE DESK AUDITS	1983	1875		1929
4. BUSINESS LICENSE FIELD AUDITS	118	52		85
5. PERSONAL PROPERTY DESK AUDITS	47550	45173		46362
6. PERSONAL PROPERTY FIELD AUDITS	0	0		0
7. MERCHANT'S CAPITAL DESK AUDITS	0	0		0
8. MERCHANT'S CAPITAL FIELD AUDITS	0	0		0
9. BUSINESS PERSONAL PROPERTY DESK AUDITS	4061	1224		2643
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS	118	0		59
11. MACHINERY & TOOLS DESK AUDITS	32	20		26
12. MACHINERY & TOOLS FIELD AUDITS	0	0		0
13. EXCISE TAX DESK AUDITS	159	132		146
14. EXCISE TAX FIELD AUDITS	118	20		69

I0048 RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

07/63

1. G. **NUMBER OF EXCISE TAX ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **This should include audits that apply to meals, lodging, admissions, short term rental, cigarettes and any other local excise taxes assessed.**
1. H. **NUMBER OF LICENSE FEES ADJUSTED:** Enter the number of license fees adjusted by your office as a result of proration or disposal of a vehicle.

#### Audits & Appeals

**Definition:** Auditing is a systematic process of objectively obtaining and evaluating evidence regarding assertions about economic actions and events to ascertain the degree of correspondence between the assertions and established criteria. For purpose of the following section, the COR or Deputy must summons additional information in writing and compare the new information to that which was originally reported.

2. **NUMBER OF APPLICATIONS RECEIVED FOR TAX RELIEF, REAL ESTATE, PERSONAL PROPERTY, DISABLED, ETC.:** Enter the total of the applications received in your office annually. **Do not** multiply this figure by any factor if you prorate or bill more than once a year. **Do not** duplicate any numbers included in adjustments under section 1.
3. **NUMBER OF BUSINESS LICENSE DESK AUDITS:** Enter the total number of desk audits completed on business license accounts annually (see annual Audit Log.) Enter the number of new taxpayers identified through discovery annually. A desk audit must follow the above stated definition. This **does not** include regular processing of license applications and renewals. Enter the number of new taxpayers identified through discovery i.e. Schedule C, annually.
4. **NUMBER OF BUSINESS LICENSE FIELD AUDITS:** Enter the total number of field audits completed on business license accounts annually. A field audit requires a visit to the physical location of the business. Enter the number of new taxpayers identified through field discovery annually.
5. **NUMBER OF PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on personal property accounts annually. A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually. **Do not** include motor vehicle record adds or deletes transferred from DMV.
6. **NUMBER OF PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on personal property accounts annually. A field audit requires a visit to the physical location of the property. Enter the number of new taxpayers identified through field discovery annually.
7. **NUMBER OF MERCHANT'S CAPITAL DESK AUDITS:** Enter the total number of desk audits completed on merchant's capital accounts annually. A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually.

## Option #7, Record Workload Information

### Option #3 Annual Screens

TSOSNIP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:37  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	27	11		19
1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTED		16072		16072
AUDITS & APPEALS:				
2. TAX RELIEF APPLICATIONS	518	700		609
3. BUSINESS LICENSE DESK AUDITS	1983	1875		1929
4. BUSINESS LICENSE FIELD AUDITS	118	52		85
5. PERSONAL PROPERTY DESK AUDITS	47550	45173		46362
6. PERSONAL PROPERTY FIELD AUDITS	0	0		0
7. MERCHANT'S CAPITAL DESK AUDITS	0	0		0
8. MERCHANT'S CAPITAL FIELD AUDITS	0	0		0
9. BUSINESS PERSONAL PROPERTY DESK AUDITS	4061	1224		2643
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS	118	0		59
11. MACHINERY & TOOLS DESK AUDITS	32	20		26
12. MACHINERY & TOOLS FIELD AUDITS	0	0		0
13. EXCISE TAX DESK AUDITS	159	132		146
14. EXCISE TAX FIELD AUDITS	118	20		69

I0048 RECORD UPDATED SUCCESSFULLY

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

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8. **NUMBER OF MERCHANT'S CAPITAL FIELD AUDITS:** Enter the total number of field audits completed on merchant's capital accounts annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.
9. **NUMBER OF BUSINESS PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on business personal property annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
10. **NUMBER OF BUSINESS PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on business personal property annually. **A field audit requires a visit to the physical location of the property.** Enter the number of new taxpayers identified through discovery annually.
11. **NUMBER OF MACHINERY & TOOLS DESK AUDITS:** Enter the total number of desk audits completed on machinery & tools annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
12. **NUMBER OF MACHINERY & TOOLS FIELD AUDITS:** Enter the total number of field audits completed on machinery & tools annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.
13. **NUMBER OF EXCISE TAX DESK AUDITS:** Enter the total number of desk audits completed on excise tax accounts annually. **A desk audit must follow the above stated definition.** Enter the number of new taxpayers identified through discovery annually.
14. **NUMBER OF EXCISE TAX FIELD AUDITS:** Enter the total number of field audits completed on excise tax accounts annually. **A field audit requires a visit to the physical location of the business.** Enter the number of new taxpayers identified through field discovery annually.

## Option #7, Record Workload Information

### Option #3 Annual Screens

Screen 7 of 11

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:39  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
15. LOCAL BUSINESS LICENSE APPEALS	0	0		0
16. STATE BUSINESS LICENSE APPEALS	0	0		0
17. LOCAL MERCHANT'S CAPITAL APPEALS	0	0		0
18. MERCHANT'S CAPITAL STATE APPEALS	0	0		0
19. LOCAL BUSINESS PERSONAL PROPERTY APPEALS	5	4		5
20. STATE BUSINESS PERSONAL PROPERTY APPEALS	0	0		0
21. LOCAL MACHINERY & TOOLS APPEALS	0	4		2
22. STATE MACHINERY & TOOLS APPEALS	0	0		0
23. LOCAL EXCISE TAX APPEALS	7	0		4
24. STATE EXCISE TAX APPEALS	0	0		0
25. LOCAL REAL ESTATE TAX APPEALS	1400	1415		1408
26. STATE REAL ESTATE TAX APPEALS	0	1		1
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:				
27. BUSINESS LIC/CAPITAL ACCTS	7932	7977		7955
28. LAND USE TAX/ROLLBACK APPL	549	343		446
29. EXCISE TAXES/BUSINESS ASSESSED	305	295		300

I0048 RECORD UPDATED SUCCESSFULLY  
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

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15. **NUMBER OF LOCAL BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed locally for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
16. **NUMBER OF STATE BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
17. **NUMBER OF LOCAL MERCHANT'S CAPITAL APPEALS:** Enter the total number of written tax appeals filed locally for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
18. **NUMBER OF MERCHANT'S CAPITAL STATE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
19. **NUMBER OF LOCAL BUSINESS PERSONAL PROPERTY APPEALS:** Enter the total number of written tax appeals filed locally for business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
20. **NUMBER OF STATE BUSINESS PERSONAL PROPERTY APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
21. **NUMBER OF LOCAL MACHINERY & TOOLS APPEALS:** Enter the total number of written tax appeals filed locally for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
22. **NUMBER OF STATE MACHINERY & TOOLS APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
23. **NUMBER OF LOCAL EXCISE TAX APPEALS:** Enter the total number of written tax appeals filed locally for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
24. **NUMBER OF STATE EXCISE TAX APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
25. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed locally for real estate tax (see Va. Code § 58.1- 3350, 58.1-3351 & 58.1-3380).
26. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed with the Circuit Court for real estate tax (see Va. Code § 58.1- 3382).

#### Business Licenses, Merchants Capital & Excise

27. **NUMBER OF BUSINESS LICENSES ISSUED AND MERCHANTS CAPITAL ACCOUNTS:** Enter the total number of all business licenses processed annually. **Do not** multiply this number by any factor if you bill multiple times per year. For those localities with merchant's capital, report the total number of accounts.
28. **NUMBER OF APPLICATIONS PROCESSED FOR LAND USE TAXATION AND ROLLBACK ASSESSMENTS:** Enter the total number of land use and rollback applications processed. This may be moved to the real estate section in future years.
29. **NUMBER OF BUSINESS ACCOUNTS ASSESSED FOR EXCISE TAXES:** Enter the total number of business accounts. This should include meals, lodging, admissions, short term rental, *right-of-way*, *911*, *utility tax*, *consumption tax (including telephone and mobile phone tax)*, *cigarettes* and any other local excise taxes assessed. **Do not** multiply this number by the number of processings during a year, i.e., **Do not** multiply by twelve for monthly processings or by four for quarterly processings.



## Option #7, Record Workload Information

### Option #3 Annual Screens

Screen 8 of 11

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:40  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION	2007	2008	2009	AVG
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC	36	40		38
30.B. FINANCIAL INST/BANK FRANCHISE TAX	11	11		11
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS	0	0		0
GENERAL ADMINISTRATIVE & LEGAL:				
32. GENERAL ADMINISTRATIVE DUTIES	226	245		236
33. SUMMONS	5	0		3
34. CRIMINAL FAILURE TO FILE COMPLAINTS	0	0		0
35. WORKMAN'S COMPENSATION AFFIDAVITS	0	0		0
36. PILOT PROGRAMS	0	0		0
INCOME TAX:				
37. STATE TAX RETURNS PROCESSED	0	0		0
38. ESTIMATED STATE TAX ASSESSMENTS	0	0		0
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX	48	31		40
40. STATE TAX RETURNS PREPARED	35	22		29
PERSONAL PROPERTY AND MACHINERY & TOOLS:				
41. PERSONAL PROPERTY ASSESSMENTS	118875	117506		118191
10048 RECORD UPDATED SUCCESSFULLY				
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN				

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30. **A. NUMBER OF FINANCIAL INSTITUTIONS IN YOUR LOCALITY.** Enter the total number of financial institutions that are in your locality.
- B. NUMBER OF FINANCIAL INSTITUTIONS WITH THEIR MAIN OFFICE IN YOUR LOCALITY THAT ARE REQUIRED TO FILE THE BANK FRANCHISE TAX WITH YOUR OFFICE:** Enter the total number of banks that file returns with your office that can be verified with the Department of Taxation
31. **NUMBER OF COAL/GAS SEVERANCE TAX, COAL ROAD TAX, OIL SEVERANCE TAX AND MINERAL TAX ACCOUNTS:** If your office handles these functions, enter the number of Coal/Gas Severance, Coal Road, Oil Severance and mineral taxes accounts. **Do not** multiply this figure by any factor if billed more than once a year.

#### General Administrative & Legal

32. **GENERAL ADMINISTRATIVE DUTIES:** Enter the total number of opinions rendered and tax accounts reviewed (i.e. following review the Code of Virginia, AG's Opinion's, DOT Guidelines). **Do not** include formal appeals (see Number of Appeals). Enter number of annual surveys completed, general information requests (including FOIA requests). Enter number of personnel reviews conducted. Enter the total number of businesses listed in the "Sales Tax Adds & Deletes" reports that you have reviewed. **Do not** add new businesses or merchant's capital. (See current workload measure #8 Number of Business Licenses Issued and Merchant's Capital Accounts.) Enter number of requests by stakeholders, such as business listings, realtor listings, new business listings, etc. **Do not** include requests for directions, office hours, and the like.
33. **NUMBER OF SUMMONS:** Enter the total number of summons issued annually (see Va. Code § 58.1-3110.)
34. **NUMBER OF CRIMINAL FAILURE TO FILE COMPLAINTS:** Enter the total number of criminal failure to file complaints issued annually (see § 58.13916.1).
35. **NUMBER OF WORKMAN'S COMPENSATION AFFIDAVITS:** Enter the total number of Workmen's Compensation Affidavits processed annually.
36. **NUMBER OF PILOT PROGRAMS:** Enter the total number of State sponsored "pilot" programs in which you are participating.

#### Income Tax

37. **NUMBER OF STATE INCOME TAX RETURNS PROCESSED BY YOUR OFFICE:** Enter the total number that can be verified by the Department of Taxation. **Do not** include tax returns prepared by your office. They will be counted under item #40 in the proposed new workload definitions.
38. **NUMBER OF STATE TAX ASSESSMENTS FOR ANNUAL ESTIMATED INCOME TAXPAYERS:** Enter the total number that can be verified by the Department of Taxation.
39. **NUMBER OF TAXPAYERS ASSISTED WITH STATE INCOME TAX:** Enter the total number taxpayers assisted with State Income Tax related questions. Include telephone and walk-in inquiries that can be verified by a daily log.
40. **NUMBER OF STATE TAX RETURNS PREPARED:** Enter the total number of tax returns your office actually prepared for taxpayers. **Do not** include returns processed. **Include all ifile returns.**

#### Personal Property & Machinery and Tools

41. **NUMBER OF PERSONAL PROPERTY ASSESSMENTS:** Enter the total number of items of the following kinds of personal property assessments in your jurisdiction: count each separate motor vehicle, motorcycle, utility, road or boat trailer, boat and motors, camper, travel trailer, aircraft, *motor home*, etc. Each item is a separate count. **Do not** multiply this factor by any factor if you prorate or bill more than once a year.

## Option #7, Record Workload Information

### Option #3 Annual Screens

Screen 9 of 11

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:42				
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY				
RECORD WORKLOAD INFORMATION - ANNUALLY				
CALENDAR YEAR	2007	2008	2009	AVG
42. PERSONAL PROPERTY REGISTRATION RENEWALS	89375	92792		91084
43. PERSONAL PROPERTY NEW REGISTRATIONS	29500	24714		27107
44. PERSONAL PROPERTY REGISTRATION DELETIONS	2329	2705		2517
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	117685	116330		117008
46.A. PPTRA COMPLIANCE	104657	102091		103374
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	23024	20418		21721
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0			0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL		500		500
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS	629	417		523
50.A. MOTOR VEHICLE LICENSE DECALS SOLD	100899	117184		109042
50.B. MOTOR VEHICLE LICENSE FEES ASSESSED		117184		117184
51. PUBLIC SERVICE CORP ASSESSED	54	55		55
52. ACCTS (MACHINERY/TOOL/PERS PROP/FARM)	117717	116357		117037
53. MOBILE HOME ASSESSMENTS	1104	1094		1099
REAL ESTATE:				
54.A. PARCELS OF LAND	40980	42161		41571
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP	F3=MENU	F7=PRV	F8=NXT	F12=MAIN
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42. **NUMBER OF PERSONAL PROPERTY REGISTRATION RENEWALS:** If your office serves as the point of registration for personal property, enter the number of the following kinds of property registration renewals in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **This number would include renewals requiring interaction with your office via mail or other confirmation. Include decals or registration fees if sold or assessed by your office. This does not include automatic downloads or rollovers.**
43. **NUMBER OF PERSONAL PROPERTY NEW REGISTRATIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property new registrations in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
44. **NUMBER OF PERSONAL PROPERTY REGISTRATION DELETIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property registrations that were deleted in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
45. **NUMBER OF PERSONAL PROPERTY PRORATION ASSESSMENTS:** If your office prorates personal property enter the total number of vehicles assessed for personal property on a monthly prorated basis. **Include only those bought, sold, moved in or moved out.**
46. **A. NUMBER OF PERSONAL PROPERTY TAX RELIEF ACT (PPTRA) COMPLIANCE:** Enter the total number of assessments subject to PPTRA compliance audit. **This should equal the total number of vehicles in your locality that were qualified to receive relief.**  
**B. NUMBER OF PERSONAL PROPERTY TAX ACCOUNTS REVIEWED FOR PPTRA COMPLIANCE:** Enter the total number of personal property tax accounts reviewed for PPTRA compliance (i.e. Schedule C's, business trade name registration, etc.). **Do not include vehicles adjusted.**
47. **NO DATA TO BE RECORDED**
48. **NUMBER OF PERSONAL PROPERTY VEHICLES REVIEWED FOR PERSONAL PROPERTY TAX RELIEF QUALIFICATION.**
49. **NUMBER OF MOTOR VEHICLE "NO FEE" DECALS ISSUED (EX., MILITARY PERSONNEL OR OWNERSHIP TRANSFERS).**
50. **A. NUMBER OF MOTOR VEHICLE LICENSE DECALS SOLD.**  
**B. NUMBER OF MOTOR VEHICLE LICENSE FEES ASSESSED**

## Option #7, Record Workload Information

### Option #3 Annual Screens

TSOSNIP - EXTRA! X-treme

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:42  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
42. PERSONAL PROPERTY REGISTRATION RENEWALS	89375	92792		91084
43. PERSONAL PROPERTY NEW REGISTRATIONS	29500	24714		27107
44. PERSONAL PROPERTY REGISTRATION DELETIONS	2329	2705		2517
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	117685	116330		117008
46.A. PPTRA COMPLIANCE	104657	102091		103374
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	23024	20418		21721
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0			0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL		500		500
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS	629	417		523
50.A. MOTOR VEHICLE LICENSE DECALS SOLD	100899	117184		109042
50.B. MOTOR VEHICLE LICENSE FEES ASSESSED		117184		117184
51. PUBLIC SERVICE CORP ASSESSED	54	55		55
52. ACCTS (MACHINERY/TOOL/PERS PROP/FARM)	117717	116357		117037
53. MOBILE HOME ASSESSMENTS	1104	1094		1099
REAL ESTATE:				
54.A. PARCELS OF LAND	40980	42161		41571
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP	F3=MENU	F7=PRV	F8=NXT	F12=MAIN

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51. **NUMBER OF PUBLIC SERVICE CORPORATIONS THAT ARE ASSESSED:** Enter the number of Public Service Corporations and Railroad companies that are assessed and that can be verified with the State Corporations Commission and the Department of Taxation.
52. **NUMBER OF MACHINERY AND TOOLS, BUSINESS PERSONAL PROPERTY AND FARM ACCOUNTS:** Enter the total number of manufacturing machinery and tools, business personal property, and farm accounts that you assess. **Do not** multiply this figure by any factor if you prorate or bill more than once a year. **Should be the same number reflected in your property book.**
53. **NUMBER OF MOBILE HOME ASSESSMENTS:** Enter the total number of mobile homes that you treat as personal property. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.

#### Real Estate

54. **A. NUMBER OF PARCELS OF LAND:** If your office assesses real estate, enter the total number of parcels of real estate, taxable and non taxable. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.

**B. (1) NUMBER OF REAL ESTATE ASSESSMENTS CONDUCTED IN-HOUSE ANNUALLY DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office oversees the real estate assessment and conducts the general reassessment enter the number of real estate parcels assessed annually from the Assessor's General Reassessments Workload Achievement Log. (If you complete more than one log, i.e., mineral accounts, land use accounts, and land parcels, add the total for all logs and enter.) **Report only in the year work is completed.**

**B. (2) NUMBER OF REAL ESTATE PARCELS ASSESSED ON A CONTRACT BASIS DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office hires an independent appraiser to assess real estate for your general reassessment, enter the number of real estate parcels assessed. **Report only in the year work is completed.**

## Option #7, Record Workload Information

### Option #3 Annual Screens

TSOSNIP - EXTRA! X-frame

MCBH-F COIN BUDGET REQUEST 10/27/2009 11:44  
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
54.B.(1) REAL ESTATE ASSESSMENTS IN-HOUSE	40980	42161		41571
54.B.(2) REAL ESTATE ASSESSED CONTRACT BASIS	0	0		0
54.C. MAPPING CHGES OR GIS UPDTS COMPLETE	6765	5710		6238
54.D. REAL ESTATE TRANSFERS	7040	6815		6928
54.E. REASSESSMENTS/NEW CONSTRUCTION	1041	697		869
DMV LICENSING AGENCY:				
55. NUMBER OF TITLES PROCESSED FOR DMV	0	0		0
56. NUM OF TRANS W/FEEs COLLECTED FOR DMV	0	0		0

I0048 RECORD UPDATED SUCCESSFULLY

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN

4B :00.1 07/63

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Screen 10 of 11

54. **C. NUMBER OF MAPPING CHANGES OR GIS UPDATES COMPLETED.**

**D. NUMBER OF REAL ESTATE TRANSFERS:** If your office handles real estate, enter the total number of transfers of parcels for the year.

**E. NUMBER OF REASSESSMENTS DUE TO NEW CONSTRUCTION:** If your office assesses new construction, enter the total number of assessments adjusted due to new construction. **Do not** enter the total number of building permits. **Do not** enter the number of visits to a property for measurements and listings.

#### DMV Licensing Agency

55. **NUMBER OF TITLES PROCESSED FOR DMV AS A DMV LICENSING AGENT:** If your office serves as a DMV Licensing Agent, enter the 1) total number of vehicle titles, (original, substitute and replacement including title maintenance or change of title information); 2) vehicle registration (original, renewal, transfer, re-issue or surrender) transactions; 3) special and personalized license plate requests processed; 4) Driver Transcript Record requests processed. Each item (titles, registrations, plate requests, transcripts) is a separate count.

56. **TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT**

**Option #7 Record Workload Information****Option #3 Annual Screens**

Screen 11 of 11

TSOSNIP - EXTRA! X-frame

MCBI-A COIN BUDGET REQUEST 10/27/2009 11:50  
 V.12102008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

RECORD WORKLOAD INFORMATION - FTE TOTALS  
 APRIL (BEFORE ALLOCATIONS)

TOTAL FULL TIME	BUDGET REDUCTION FTE	FTE TOTAL	FTE REQUIRED	FTE DIFFERENCE	WEIGHTED
0	1.78-	1.78	18.83	20.61	48202.24

NEED PERCENT REQUEST NEW

1157.87- 0

F1=HELP F2=AUTH BUDGET F3=MENU F4=TOTALS F7=PREV F12=MAIN

4B :00.6 01/01

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start Inbox - Microsoft O... 1 Reminder Re: Sherman Hollan... Directors of Finance Directors of Financ... TSOSNIP - EXTRA! X-frame

This screen shows the following information based on the data entered as part of the budget request process:

- Total Full Time- The total full time employees currently in the office
- Budget Reduction FTE- The FTE adjustment made to current CB FTE and is based on the actual salary amounts reduced as a result of budget reductions divided by the average salary of a position.
- FTE Total- The total number of Full Time equivalent positions this office has
- FTE Required- According to the workload information they have submitted and the weights attached to each workload, this is how many full time positions this office should have.
- FTE Difference- The difference between the FTE Total and FTE Required
- Weighted- The weighted workload is the combined result of multiplying the 3-year average of each workload item by their applicable weights.
- Need Percent- The percent of need for your office
- Requested New- The number of new positions requested

The percentage of need is based on the formula below

$$\text{Staffing Need} = y = 1.594 + 0.0005x + -3e-9x^{1.95}$$

**Option #7 Record Workload Information**

Treasurer's Workload Elements		Weighted Factor
<b>Real Estate Tax:</b>		
1	Number of taxable parcels	0.09
2	Number of parcels maintained for mortgage companies	0.04
3	Number of real estate abatements	0.21
4	Number of real estate tax bills processed per year	0.00
5	Number of real estate transfers	0.02
6	Number of real estate parcels in relief to the elderly/disabled program	0.14
7	Number of parcels in the land use program	0.01
<b>Personal Property:</b>		
8	Number of personal property items in relief to the elderly/disabled program	0.10
9	Number of items on which personal property tax is assessed each year	0.05
10	Number of personal property tax bills processed per year	0.00
11	Number of personal property address changes updated	0.05
12	Number of personal property abatements	0.03
<b>PPTRA Dog Licenses:</b>		
13	<del>Duplicate reports for personal property relief (PPTRA)</del>	<del>0.36</del>
	<b>Number of dog licenses sold</b>	<b>0.10</b>
14	<del>PPTRA compliance audit</del>	<del>0.53</del>
	<b>Dog license notices</b>	<b>0.14</b>
15	<del>PPTRA records submitted for reimbursement</del>	<del>0.00</del>
	<b>Rabies certificates sent to other localities</b>	<b>0.01</b>
<b>Collection Actions:</b>		
16	Number of accounts in debt set off program based on number of claims filed	0.02
17	Number of warrants <b>in debt</b> issued	0.15
18	Number of parcels in judicial sale proceedings	2.01
19	Number of <del>3952 tax</del> liens issued ( <b>includes bank, wage, and other third party liens</b> )	0.40
20	Number of Treasurers' summons	1.13
21	Number of distress <del>warrants</del> <b>actions to seize property</b>	4.03
22	Total of delinquent notices for real estate and personal property	0.02
23	Number of DMV stops issued	0.23
24	Number of monthly payment plans maintained for prepayment of taxes and delinquent collections ( <b>include ACH payments</b> )	0.69
25	Number of meals tax enforcement actions <b>by distress</b> taken to <del>"padlock" business</del>	4.03
26	Number of other collections	0.28
<b>Fees, Permits, and Other Licenses:</b>		
27	Number of vehicle <del>decals issued</del> <b>license sold</b>	0.04
28	Number of other vehicle registrations	0.06
29	<del>Number of dog licenses sold</del>	<del>0.10</del>
	<b>Number of vehicle license fees billed (include abatements)</b>	<b>0.01</b>
30	Number of utility bills collected	0.00
31	Number of trash collection bills collected	0.00
32	Number of annual trash decals issued	0.00
33	Number of parking tickets collected	0.00
34	Number of zone permit parking fees collected	0.00

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE**

35	Number of building permits processed	0.00
36	Number of local businesses on which license tax is collected ( <b>BPOL</b> )	0.00
37	Number of business accounts on which local excise tax is collected	0.00
38	Number of utility tax and consumer utility tax accounts	0.00
39	Number of parks and recreation fees processed	0.00
Treasurer's Workload Elements		Weighted Factor
40	Number of other local bills collected	0.00
<b>State Income Tax and Other State Duties:</b>		
41	Number of state income tax memoranda received/processed	0.16
42	Number of collection actions initiated against state income tax returns	0.15
43	Number of accounts maintained on estimated state income tax returns	0.12
44	Number of estimated state income tax payments collected	0.07
45A	Number of titles processed for DMV	0.25
46	Total number of transactions for which fees are collected for DMV	0.07
<b>Financial Management:</b>		
	<del>Bank reconciliations</del>	0.02
47	<b>Number checks/ACH issued</b>	
48	Returned checks	0.64
49	Preparation of payroll and administration	0.00
50	Number of bankruptcy claims filed	0.92

Staffing Need = $y = 1.594 + 0.0005x + -3e-9x^{1.95}$
---

Commissioner's Workload Elements		Weighted Factor
<b>Adjustments:</b>		
1A	Number of Real Estate Tax Assessments Adjusted	0.37
1B	Number of Business License Assessments Adjusted	0.44
1C	Number of Personal Property Assessments Adjusted	0.08
1D	Number of Business Personal Property Assessments Adjusted	0.50
1E	Number of Merchant's Capital Assessments Adjusted	0.31
1F	Number of Machinery & Tools Assessments Adjusted	0.83
1G	Number of Excise Tax Assessments Adjusted	0.66
1H	<b>Number of Personal Property License Fees Adjusted</b>	<b>0.00</b>
<b>Audits &amp; Appeals:</b>		
2	Number of applications received for tax relief, real estate, personal property, disabled, etc.	0.30
3	Number of business license desk audits	0.51
4	Number of business license field audits	1.58
5	Number of personal property desk audits	0.05
6	Number of personal property field audits	0.74
7	Number of merchant's capital desk audits	0.13
8	Number of merchant's capital field audits	0.98

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE**

9	Number of business personal property desk audits	0.29
10	Number of business personal property field audits	6.93
11	Number of machinery & tools desk audits	0.90
12	Number of machinery & tools field audits	6.34
13	Number of excise tax desk audits	0.75
14	Number of excise tax field audits	5.03
15	Number of local business license appeals	7.19
16	Number of state business license appeals	22.19
17	Number of local merchant's capital appeals	0.76
18	Number of merchant's capital state appeals	1.43
19	Number of local business personal property appeals	1.73
20	Number of state business personal property appeals	0.19
21	Number of local machinery & tools appeals	4.96
22	Number of state machinery & tools appeals	0.19
23	Number of local excise tax appeals	26.95
<b>Commissioner's Workload Elements</b>		<b>Weighted Factor</b>
24	Number of state excise tax appeals	0.19
25	Number of local real estate tax appeals	0.63
26	Number of state real estate tax appeals	1.30
<b>Business Licenses, Merchants Capital &amp; Excise:</b>		
27	Number of Business Licenses Issued and Merchants Capital Accounts	0.27
28	Number of Applications Processed for Land Use Taxation and Rollback Assessments	0.21
29	Number of Business Accounts Assessed for Excise Taxes	0.68
30A	Number of Financial Institutions in Your Locality	0.98
30B	Number of Financial Institutions with their main office in your locality that are required to file the bank franchise tax with your office	1.74
31	Number of coal/gas severance tax, coal road tax, oil severance tax and mineral tax accounts	0.25
<b>General Administrative &amp; Legal:</b>		
32	General administrative duties	0.00
33	Number of summons	0.00
34	Number of criminal failure to file complaints	0.00
35	Number of workman's compensation affidavits	0.06
36	Number of pilot programs	0.00
<b>Income Tax:</b>		
37	Number of state income tax returns processed by your office	0.12
38	Number of state tax assessments for annual estimated income taxpayers	0.15
39	Number of taxpayers assisted with state income tax	0.18
40	Number of state tax returns prepared	0.40
<b>Personal Property and Machinery &amp; Tools:</b>		
41	Number of personal property Assessments	0.03
42	Number of personal property registration renewals	0.02
43	Number of personal property new registrations	0.06



CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

44	Number of personal property registration deletions	0.03
45	Number of personal property proration assessments	0.00
46A	Number of personal property tax relief act (PPTRA) compliance	0.01
46B	Number of personal property tax accounts reviewed for PPTRA compliance	0.04
47	Number of personal property vehicles researched for the DMV PPTRA duplication report	0.20
48	<del>Number of personal property vehicles researched for the DMV PPTRA reconciliation report</del> <b>Number of motor vehicle records reviewed for personal property tax relief qualification</b>	0.00
49	Number of motor vehicle "no fee" decals issued (ex. Military personnel or ownership transfers)	0.00
50A	Number of motor vehicle license decals sold	0.00
50B	<del>Number of motor vehicle license decals sold</del> <b>fees assessed</b>	0.00
51	Number of public service corporations that are assessed	0.65
52	Number of machinery and tools, business personal property and farm accounts	0.15
53	Number of mobile home assessments	0.08
<b>Real Estate:</b>		
54A	Number of parcels of land	0.03
<b>Commissioner's Workload Elements</b>		<b>Weighted Factor</b>
54B1	Number of real estate assessments conducted in-house annually during your locality's general assessment	0.06
54B2	Number of real estate parcels assessed on a contract basis during your localities general assessment	0.01
54C	Number of mapping changes or GIS updates completed	0.35
54D	Number of real estate transfers	0.41
54E	Number of reassessments due to new construction	0.90
<b>DMV Licensing Agency:</b>		
55	<del>Number of DMV licensing agency transactions</del> <b>Number of titles processed for DMV</b>	<b>0.25</b>
56	<b>Total number of transactions for which fees are collected for DMV</b>	<b>0.07</b>

Staffing Need =	$y = 1.3074 + 0.0005x + -2e-9x^{1.95}$
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## 10. Option #8 – Update Locality Information

### Purpose:

This screen is used to update the address, website address, phone, and fax numbers for your office. Please also provide the primary contact person, his/her phone number and, an email address so that we may contact you directly should there be questions regarding your budget.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #8, Update Locality Information

### Option #8 Update Locality Information

VITA1 - Rick - EXTRA! X-treme

Scratch Pad My Scratch Pad

MCS2 COIN BUDGET REQUEST 11/30/2009 16:44

V.10272009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION

OFFICER....: RICHARD M WIGGANS

TITLE.....: DIRECTOR OF FINANCE

LOCALITY...: ALBEMARLE COUNTY

ADDRESS....: 401 MCINTIRE ROAD, ROOM 149

CITY.....: CHARLOTTESVILLE

STATE.....: VA ZIP: 22902 - 4596

TELEPHONE..: 4342965855 EXT: 3037

FAX.....: 4348724598

WEBSITE....: WWW.ALBEMARLE.ORG

CONTACT PERSON

FULL NAME...: DON SMITH

TELEPHONE..: 1234567890 EXT: 153

EMAIL.....: DON@EMAIL.GOV

UPDATE SUCCESSFUL

F1=HELP F3=MENU F12=MAIN

4R 00.1 08/16

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start Microsoft Office Directors of Finance VITA1 - Rick - EXTRA!

## Option #8 Update Locality Information

VITA1 - Rick - EXTRA! X-treme

Scratch Pad MCS2 COIN BUDGET REQUEST 11/30/2009 16:44  
 V.10272009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION  
 OFFICER..... RICHARD M WIGGANS  
 TITLE..... DIRECTOR OF FINANCE  
 LOCALITY... ALBEMARLE COUNTY  
 ADDRESS.... 401 MCINTIRE ROAD, ROOM 149  
 CITY..... CHARLOTTESVILLE  
 STATE..... VA ZIP: 22902 - 4596  
 TELEPHONE.. 4342965855 EXT: 3037  
 FAX..... 4348724598  
 WEBSITE.... WWW.ALBEMARLE.ORG

CONTACT PERSON  
 FULL NAME.. DON SMITH  
 TELEPHONE.. 1234567890 EXT: 153  
 EMAIL..... DON@EMAIL.GOV

UPDATE SUCCESSFUL

F1=HELP F3=MENU F12=MAIN

08/16

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start Microsoft Office ... Directors of Finance ... VITA1 - Rick - EXTRA! ... 4:45 PM

### Helpful Hints:

- Enter the SCB USERID of the person completing the specified task, then depress the “Enter” key to auto-fill the name associated with this USERID
- Data fields on the Update Locality Information screen must be completed before Certifying the Budget Request
- It is very important that we obtain the name of the person we can contact if we have questions regarding your Budget Request
- Screens will time out after 15 minutes of inactivity.
- Budget Contact- office contact for current budget request submission
- Personnel Contact- office contact for personnel questions (CB10s)
- Reimbursement Contact- office contact for reimbursement information
- These contacts may be the same or different employee(s)
- Cannot update any contact information fields until the SCB USERID is entered

## Option #8 Update Locality Information

COIN  
QWS3270 Edit View Options Tools Help

MCS2 COIN SYSTEM MAINTENANCE 11/26/2018 14:26  
V.11132017 LOC: 003 OFF: 717 ALBEMARLE COUNTY

UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION  
OFFICER..... WILLIAM M LETTERI  
TITLE..... DIRECTOR OF FINANCE  
LOCALITY.... ALBEMARLE COUNTY  
ADDRESS..... 401 MCINTIRE ROAD, ROOM 149  
CITY..... CHARLOTTESVILLE  
STATE..... VA ZIP: 22902 - 4596  
TELEPHONE.. 4342965855 EXT:  
FAX..... 4348724598  
OFFR EMAIL.: BLETTERI@ALBEMARLE.ORG

CONTACT PERSON  
FULL NAME.. VALOREE SMITH  
TELEPHONE.. 4342965855 EXT: 1  
EMAIL..... VSMITH2@ALBEMARLE.ORG

F1=HELP F3=MENU F12=MAIN

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### Procedures:

To change the information currently displayed on the screen type over the information and depress the “enter” key. You will receive an update confirmation message.

1. Press the “TAB” key to move to the desired field.
2. Enter the following information to update the locality information

<b>Officer Name:</b>	For display purposes only (will change when personnel action has been entered)
<b>Title:</b>	For display purposes only.
<b>Locality:</b>	Enter the locality name. <b>If the locality field includes the officer’s title, please remove it so it only shows the locality name, including distinction between city or county (see example).</b>
<b>Address:</b>	Enter the correct mailing address for your office (street number or P O Box)
<b>City:</b>	Enter the correct City for your mailing address.
<b>State:</b>	Enter the correct State for your mailing address.
<b>Zip:</b>	Enter the correct Zip code for your mailing address. If the last 4 positions of the zip code are not known, you may leave this field blank.
<b>Telephone:</b>	Enter the Correct Phone number for your office.
<b>Fax #:</b>	Enter the Correct Facsimile number for your office.
<b>Off Email:</b>	Please enter the Officer’s Email address in this field.
<b>Contact Person:</b>	Type the first and last name of the contact person for the Budget request
<b>Telephone: Ext:</b>	Type the phone number and ext of the contact person for the budget request.
<b>Email:</b>	Type the email address of the contact person for the budget request.

3. Press the “ENTER” key, when you have corrected or completed the information requested

4. Press 'F3 =Exit' to exit the screen to budget request menu

**NOTE: When changes in the address occur during the year you may use option 8 from the COIN Main Menu to update this information.**

Update Officer and/or County/City Administrator Email Address  
(Compensation Board Website [www.scb.virginia.gov](http://www.scb.virginia.gov))

5. If you wish to receive communications from the Compensation Board via email, you may update the email addresses for Constitutional Officers, Contact or county/city administrators for your offices by clicking on the link below and following these instructions:
- <http://www.scb.virginia.gov/cbemail1.cfm>
  - Enter your FIPS Code **001-840** (Accomack-Winchester) The number you use to access COIN each month
  - Enter you Office Code **-717** (Director of Finance)
  - County/City Administrators enter office code **-100**
  - Click '**SUBMIT**'
  - To add a new email address Click '**ADD EMAIL ADDRESS**'
  - To delete an email address, click on the email address to be deleted and click '**DELETE**'
  - To change a current email address click on the email address, correct the email address and then click '**UPDATE**'
  - Note: Please do not add 2 email address at the same time in the same record.

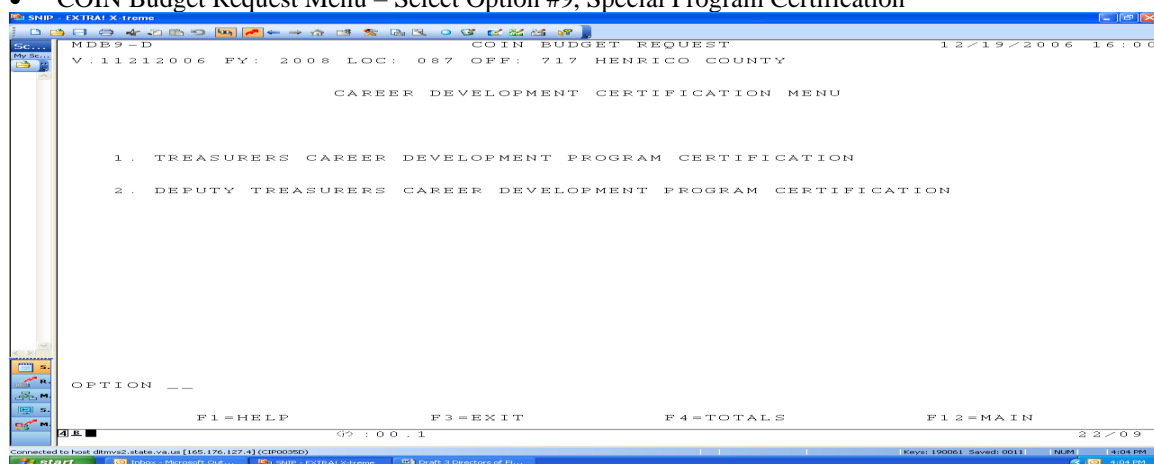
## 11. Option #9, Special Program Certification

Specified Certification Programs are accessed from the COIN Budget Request Menu. The program will determine based on locality and office which special programs to display.

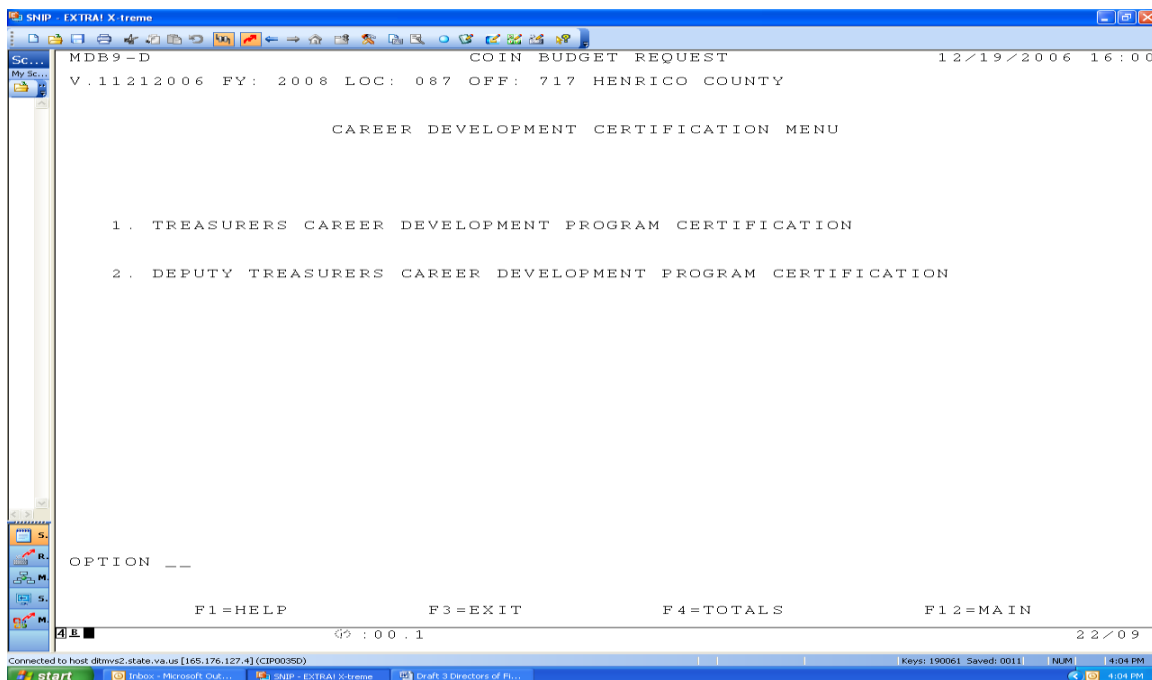
- **Directors of Finance Career Development Program – There currently is no funding for a Director of Finance or Deputy Career Development Program.**

### Navigational Path:

- COIN Main Menu – Select #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #9, Special Program Certification



## Option #9, Special Program Certification



- Option #1 Treasurers Career Development Program Certification
- Option #2 Deputy Treasurers Career Development Program Certification

### Procedures:

- ✓ Even though there is currently no funding for this program, you must press F8 to navigate through the screens to the end and Certify 'N'
- ✓ Enter the Officer's SCB USERID as the Approval User-ID
- ✓ **DO NOT** List employees that participate in the Career Development Programs

## Option #9, Special Program Certification

### Option #1 Director of Finance Career Development Program Certification

Screen 1 of 5

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

Sc... MCCA-A COIN BUDGET REQUEST 11/28/2007 15:22

V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

TREASURER'S CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

A. I HAVE ACHIEVED LEVEL II CERTIFICATION FROM THE WELDON COOPER CENTER FOR PUBLIC SERVICE AT THE UNIVERSITY OF VIRGINIA.

B. I HAVE DEVELOPED AND IMPLEMENTED WRITTEN POLICIES CONSISTENT WITH STATE AND FEDERAL LAW ADDRESSING LEAVE AND ATTENDANCE, EQUAL OPPORTUNITY, SEXUAL HARASSMENT, RECRUITMENT AND SELECTION, AND EMPLOYEE DISCIPLINARY PROCEDURES OR ADOPTED LOCAL GOVERNMENT POLICIES THAT MEET THE SAME STANDARD.

C. I HAVE ADOPTED THE COMPENSATION BOARD'S MINIMUM CRITERIA FOR EMPLOYEE EVALUATION PLANS, AND DEPUTY TREASURER DEVELOPMENT PLANS.

D. I HAVE A WRITTEN CUSTOMER SERVICE POLICY.

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 00.1 01/01

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- Read and then Press 'F8' to proceed to the next page



## Option #9, Special Program Certification

Screen 2 of 5

MCCA-B COIN BUDGET REQUEST 11/28/2007 15:22

V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

TREASURER'S CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

E. I HAVE A WRITTEN INVESTMENT POLICY.

F. THE AUDIT REPORT REPORTED NO FINDINGS OF MATERIAL FINANCIAL WEAKNESS UNDER MY DIRECTION AND THAT NO INTERNAL SHORTCOMINGS IDENTIFIED IN THE PRIOR YEAR MANAGEMENT LETTER WERE REPEATED IN THE MOST RECENT AUDIT. I HAVE TWO CONSECUTIVE AUDITS, FROM THE APA AND AN INDEPENDENT AUDIT FIRM, WITH THE TIME PERIOD COVERED BY ALL AUDITS BEING COMPLETELY WITHIN MY TERM OF OFFICE.

AUDITOR OF PUBLIC ACCOUNTS FOR THE PERIOD ENDING: MM / DD / YYYY

INDEPENDENT AUDIT REPORT FOR THE PERIOD ENDING: MM / DD / YYYY

NAME OF INDEPENDENT AUDIT REPORT: -----

IF THE AUDIT REPORT IS NOT FOR THE PAST FISCAL YEAR, PROVIDE EXPLANATION: -----

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

16/52

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- Please do not enter the period ending date for any of the data the program you are prompted to provide. This could result in not being able to certify. If there is any 'old' data showing in any of these fields, please remove all data.
- Press 'F8' to proceed with certification

## Option #9, Special Program Certification

Screen 3 of 5

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCA-C COIN BUDGET REQUEST 11/28/2007 15:23

V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

TREASURER'S CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

G. I HAVE A WRITTEN DELINQUENT COLLECTIONS POLICY; COLLECTION RATES FOR REAL ESTATE TAXES IS EQUAL TO OR GREATER THEN 95%, AND PERSONAL PROPERTY TAXES IS EQUAL TO OR GREATER THAN 90%. THESE PERCENTAGES ARE MEASURED 12 MONTHS AFTER EACH YEAR'S DUE DATE AND OCCURRED DURING MY TERM OF OFFICE. I HAVE CALCULATED MY COLLECTION RATE USING THE COMPENSATION BOARD'S FORMULA ESTABLISHED IN THE AMENDED MINIMUM CRITERIA FOR TREASURER'S CAREER DEVELOPMENT PROGRAMS.

REAL ESTATE TAX:

DUE DATE: MM / YYYY

COLLECTION RATE CALCULATED 12 MONTHS FROM DUE DATE: 0.0000\_

PERSONAL PROPERTY TAX:

DUE DATE: MM / YYYY

COLLECTION RATE CALCULATED 12 MONTHS FROM DUE DATE: 0.0000

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

17/21

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Keys: 388965 Saved: 0005

3:17 PM

- Again, please do not enter any of the requested data.
- Remove any 'old' data if it exists, then hit ENTER.
- Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

Screen 4 of 5

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCA-D COIN BUDGET REQUEST 11/28/2007 15:23

V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

TREASURER'S CAREER DEVELOPMENT PROGRAM

H. I HAVE MET THE STAFF DEVELOPMENT AND TRAINING REQUIREMENTS DEFINED IN THE TREASURER'S CAREER DEVELOPMENT PROGRAM.

THE FOLLOWING EMPLOYEES IN MY OFFICE ARE ENROLLED AND PARTICIPATING IN THE CERTIFIED DEPUTY TREASURER'S PROGRAM ADMINISTERED BY THE WELDON COOPER CENTER FOR PUBLIC SERVICE:

LAST NAME:	FIRST
-----	-----
-----	-----
-----	-----
-----	-----
-----	-----
-----	-----
-----	-----

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

01/01

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Keys: 388966 Saved: 0005 NUM 3:17 PM

Press 'F8' to proceed to the next page

### Helpful Hints

- Again, please do not fill any of this information out. DO NOT enter any names on this screen. It is for Treasurers only. There currently is not any funding for a Career Development Program for Directors of Finance or Staff.
- If there are any names populated, they will need to be deleted before you are able to certify your Special Programs or your Budget Request.
- Press 'F8' to proceed to certification.

## Option #9, Special Program Certification

Screen 5 of 5

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCA-F COIN BUDGET REQUEST 11/28/2007 15:23

V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

TREASURER'S CAREER DEVELOPMENT PROGRAM

I UNDERSTAND THAT I MUST SUBMIT THIS CERTIFICATION AS PART OF MY ANNUAL BUDGET REQUEST TO THE COMPENSATION BOARD BY FEBRUARY 1 OF EACH YEAR IN ORDER TO BE CONSIDERED FOR A 9.3% PAY RAISE EFFECTIVE THE FOLLOWING JULY 1ST.

I AGREE TO PROVIDE SUCH DOCUMENTATION AS NECESSARY TO SUBSTANTIATE THIS CERTIFICATION UPON REQUEST OF THE COMPENSATION BOARD. MY GOVERNING BODY OR ANY INDIVIDUAL OR ORGANIZATION COVERED UNDER THE VIRGINIA FREEDOM OF INFORMATION ACT. I UNDERSTAND THAT I WILL HAVE SEVEN CALENDAR DAYS TO RESPOND TO COMPENSATION BOARD REQUESTS, AND THAT FAILURE TO RESPOND WITHIN THE TIME LIMIT WILL RESULT IN MY APPLICATION FOR CERTIFICATION BEING DENIED FOR THAT YEAR. I HAVE PROVIDED A COPY OF THIS CERTIFICATION TO MY GOVERNING BODY.

TREASURER MEETS ALL CRITERIA OF CDP (Y/N) \_

APPROVAL : OFFICER APPROVAL USER-ID: \_\_\_\_\_ NAME :

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 00.1 18/44

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- Enter 'N' for "Treasurer Meets all criteria for CDP"
- Enter the Officer's SCB USERID to certify

### Helpful Hints

- On this screen, you **must** answer "N" to the question "Treasurer meets all criteria of CDP.

## Option #9, Special Program Certification

### Option #2 Deputy Director of Finance Career Development Program Certification

Read through each screen to determine compliance with Compensation Board Minimum Standards for Deputy Director of Finance's Career Development Program

Screen 1 of 4

MCCB-A COIN BUDGET REQUEST 11/28/2007 15:24

V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THIS OFFICE INCORPORATES THE FOLLOWING CRITERIA:

A. CERTIFICATION OF PARTICIPATION IN A PERSONNEL EVALUATION PLAN MEETING THE MINIMUM CRITERIA AS ESTABLISHED BY THE COMPENSATION BOARD.

B. COMPETITIVE SELECTION PROCESS IN WHICH THE TREASURER MAKES THE FINAL DECISION REGARDING SELECTION.

C. MINIMUM LENGTH OF SERVICE REQUIREMENT OF THREE YEARS AS DEPUTY TREASURER OR COMPARABLE SERVICE IN THE OFFICE IN WHICH APPOINTMENT IS SOUGHT.

D. JOB PERFORMANCE EVALUATION OF TWO CONSECUTIVE ANNUAL EVALUATIONS WHICH (1) HAVE OVERALL ABOVE AVERAGE RATINGS; (2) HAVE NO JOB PERFORMANCE OBJECTIVE BELOW AVERAGE AND (3) NO MORE THAN ONE WRITTEN REPRIMAND FROM THE TREASURER WITHIN THE TWO YEARS IMMEDIATELY PRECEDING APPLICATION FOR SELECTION.

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 R : 00.1 01/01

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Press 'F8' to proceed to the next page

## Option #9, Special Program Certification

### Screen 2 of 4

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCB-B COIN BUDGET REQUEST 11/28/2007 15:25

V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THIS OFFICE INCORPORATES THE FOLLOWING CRITERIA:

E. ACHIEVEMENT OF MASTER GOVERNMENTAL DEPUTY TREASURER (LEVEL II, CERTIFICATION) BY THE WELDON COOPER CENTER FOR PUBLIC SERVICE AT THE UNIVERSITY OF VIRGINIA, AND COMPLETION OF THE ANNUAL CONTINUING EDUCATIONAL REQUIREMENT TO MAINTAIN THE MASTER GOVERNMENTAL DEPUTY TREASURER DESIGNATION. ACHIEVEMENT OF ANY ADDITIONAL EDUCATION AND TRAINING REQUIREMENTS ESTABLISHED BY THE TREASURER.

F. A PROCEDURE FOR THE REMOVAL OF DEPUTIES FROM THE CDP FOR INADEQUATE JOB PERFORMANCE, DISCIPLINARY ACTION, OR FAILURE TO MAINTAIN MINIMUM ADDITIONAL EDUCATIONAL REQUIREMENTS.

G. EQUAL OPPORTUNITY FOR ALL DEPUTIES.

H. STATEMENT OF PURPOSE.

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

01/01

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Keys: 388983 Saved: 0005 NUM 3:18 PM

Press 'F8' to proceed to the next page

### Screen 3 of 4

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCB-C COIN BUDGET REQUEST 11/28/2007 15:25

V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THIS OFFICE INCORPORATES THE FOLLOWING CRITERIA:

I. SCOPE OF THE PLAN

J. UNDERSTANDING OF EMPLOYMENT AS DEPUTY TREASURER.

K. POSITIONS ELIGIBLE FOR PARTICIPATION IN THE PLAN.

L. STATEMENT OF ADDITIONAL COMPENSATION.

F8 TO PROCEED TO CERTIFICATION

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

01/01

Connected to host dtmvs2.state.va.us [165.176.127.4] (CIP01B5C)

Keys: 388986 Saved: 0005 NUM 3:19 PM

Press 'F8' to proceed with certification

## Option #9, Special Program Certification

Screen 4 of 4

SNIP - EXTRA! X-treme

File Edit View Tools Session Options Help

MCCB-D COIN BUDGET REQUEST 11/28/2007 15:25

V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THE FOLLOWING COMPENSATION BOARD FUNDED DEPUTY  
TREASURERS ARE DULY SWORN BY THE CLERK OF THE CIRCUIT COURT AND MEET OR EXCEED  
THE CRITERIA SET FORTH IN C, D AND E, AND A 9.3% INCREASE IS REQUESTED:

POSITION: LAST NAME: FIRST NAME:

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DEPUTIES ARE ELIGIBLE FOR CDP INCREASE (Y/N) \_

APPROVAL: OFFICER USER-ID: -----

F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NEXT F12=MAIN

4 11/28/2007 15:25

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For Deputies of the Directors of Finance, there currently is no funding for Career Development.

### Procedure

- Do not enter any Position Numbers
- Enter 'N' for "Deputy is eligible for the CDP increase"
- Enter the Officer's SCB USERID to certify

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE  
BUDGET REQUEST (OLB)



## 12. Option #10 - Certify Budget Request

### Purpose:

This Certify Budget Request is accessed from the COIN Budget Request Menu. This screen enables the Local Officer to certify that the budget request is accurate and also enables the Compensation Board to approve that the budget request is within CB policy.

### Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #10, Certify Budget Request

### DIRECTORS OF FINANCE

SHIP - EXTRA X-treme

MCB8 COIN BUDGET REQUEST 12/19/2006 16:02

V.12062006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

CERTIFY BUDGET REQUEST

I CERTIFY THAT THIS REPRESENTS AN ACCURATE STATEMENT OF OFFICE WORKLOAD DATA, SALARY SUPPLEMENTS, LOCALLY FUNDED POSITIONS, AND MY ANTICIPATED FUNDING NEEDS FOR THE UPCOMING FISCAL YEAR. I HAVE NOTIFIED THE GOVERNING BODY OF MY LOCALITY OF THE AVAILABILITY FOR REVIEW OF THE REQUEST AND HAVE PROVIDED THEM A COPY OF ALL DOCUMENTS AND JUSTIFICATION FORWARDED TO THE COMPENSATION BOARD.

APPROVAL:

LOCALITY: DATE: 12/19/2006 OFFICER LOGON: \_\_\_\_\_

CB: DATE: \_\_\_\_\_ CB LOGON: \_\_\_\_\_

CB REVIEW (Y/N): \_

REMOVE SIGNOFF (Y): \_

MUST COMPLETE SPECIAL PROGRAMS CERTIFICATION BEFORE SIGN-OFF

F1=HELP F3=EXIT F4=TOTALS F12=MENU

16/51

Connected to host dtmvs2.state.va.us [165.176.127.4] (CIP003SD)

Keys: 190079 Saved: 0011 NUM 4:06 PM

### Helpful Hints:

- If you enter the Officer's SCB USERID to submit your budget request and all screens that have required fields have not been processed, the system will not accept your sign off
  - ✓ Under this condition, the system will inform you that a required process has not been completed and a message will direct you to the incomplete process selection on the On-line Budget Menu
- Once you have submitted your budget request you may not further modify your request
  - ✓ From the time of your submission, which is due February 1, you may only view your submission



## Option #10, Certify Budget Request

SHIP - EXTRA! X-frame

MCB8 COIN BUDGET REQUEST 12/19/2006 16:02

V.12062006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

CERTIFY BUDGET REQUEST

I CERTIFY THAT THIS REPRESENTS AN ACCURATE STATEMENT OF OFFICE WORKLOAD DATA, SALARY SUPPLEMENTS, LOCALLY FUNDED POSITIONS, AND MY ANTICIPATED FUNDING NEEDS FOR THE UPCOMING FISCAL YEAR. I HAVE NOTIFIED THE GOVERNING BODY OF MY LOCALITY OF THE AVAILABILITY FOR REVIEW OF THE REQUEST AND HAVE PROVIDED THEM A COPY OF ALL DOCUMENTS AND JUSTIFICATION FORWARDED TO THE COMPENSATION BOARD.

APPROVAL:

LOCALITY: DATE: 12/19/2006 OFFICER LOGON: \_\_\_\_\_

CB: DATE: \_\_\_\_\_ CB LOGON: \_\_\_\_\_

CB REVIEW (Y/N): \_

REMOVE SIGNOFF (Y): \_

MUST COMPLETE SPECIAL PROGRAMS CERTIFICATION BEFORE SIGN-OFF

F1=HELP F3=EXIT F4=TOTALS F12=MENU

16/51

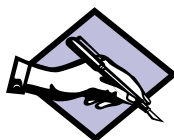
Connected to host dtwvs2.state.va.us [165.176.127.4] (CIP003SD) Keys: 190079 Saved: 0011 NUM 4:06 PM

### Helpful Hints (Continued):

- Upon approval of your budget on May 1, you will be able to view your budget submission as approved, which will include any adjustments made by the Compensation Board
- Please check your request for any final changes
  - ✓ If the Officer's SCB USERID has been entered, you cannot make changes to your Budget Request.
  - ✓ If your screen has error messages on the bottom of the screen, you have not Certified
    - Please go back to the 'Option' shown in the error on the bottom of your screen and complete the required fields, and then return to the certification screen to certify your budget request

### Procedures:

- Enter the officer's SCB USERID as the 'Officer Logon' to Certify fiscal year budget submission
- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu



### 13. Option #11, Comments

#### PURPOSE:

The Comments screen is accessed from the COIN Budget Request Menu. This screen allows comments by any local officer or Compensation Board representative.

#### NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #11, Comments

<b>DIRECTORS OF FINANCE</b>
-----------------------------

#### HELPFUL HINTS:

- There are unlimited 'Comment' screens that allow the entry of comments in a free form format
- This screen will Time Out if your computer is idle for 15 minutes
  - ✓ Suggest that you have all the information needed before starting this process
- The use of these screens is optional and the data entered is not edited
- This screen is available for any information you think is necessary for the Compensation Board to know about your on-line budget request

#### PROCEDURES:

- Enter "A" to add a comment or "D" to delete a comment
- Input the information you want to address
- Press the "Enter" key after your comments have been entered
- Reference the section of the on-line budget request your comments are referring to
  - ✓ Example: Option #2, Additional Employee Request
- Press 'F3' to exit the screen to the Budget Request Menu



## 14. Function Key 'F4' - Budget Request Totals

### PURPOSE:

The 'F4=Totals' Function Hot Key screen reflects your Budget Request Totals. These screens capture your Current Budget, Budget Requested Totals and Compensation Board Approved Budget for the next fiscal year that will be displayed by May 1 of each year. The categories captured within these screens are Permanent Personnel, Additional Personnel, Temporary Personnel, Office Expenses and Equipment.

### NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Function Key 'F4'

SNIP - EXTRA! X-frame							
MCBB-A COIN BUDGET REQUEST 12/19/2006 16:03							
V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY							
BUDGET REQUEST TOTALS							
PERMANENT PERSONNEL							
	BUDGET	-ESTIMATED	BUDGET-	REIM	-ESTIMATED	REIM-	
	SALARY	FRINGES	TOTAL	SALARY	FRINGES	TOTAL	
CURR BDGT	1,539,526	213,070	1,752,596	812,835	112,496	925,331	
REQUESTED	1,539,526	213,070	1,752,596	812,835	112,496	925,331	
COMP BOARD	0	0	0	0	0	0	
TOTAL PERMANENT PERSONNEL:		50					
TEMPORARY PERSONNEL							
	BUDGET	-ESTIMATED	BUDGET-	REIM	-ESTIMATED	REIM-	
	SALARY	FRINGES	TOTAL	SALARY	FRINGES	TOTAL	
CURR BDGT	44,578	6,169	50,747	22,289	3,084	25,373	
REQUESTED	0	0	0	0	0	0	
COMP BOARD	0	0	0	0	0	0	
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU							
02/17							
Connected to host: dtmvs2.state.va.us [165.176.127.4] (CIP0035D) Keys: 190004 Saved: 0011 NUM 4:06 PM							

### HELPFUL HINTS:

- The Budget Request Totals are displayed on three screens
  - ✓ Screen #1 displays the totals for Permanent and Temporary Personnel funding requests
  - ✓ Screen #2 displays the totals for Equipment funding requests
  - ✓ Screen #3 displays the totals for all budget request categories
- To navigate through the screens use the 'F7' key to view a previous page or 'F8' to view the next page
- This screen can be accessed from any Budget Request screen by depressing the 'F4' key
- Pressing the 'F3' key will return you to the screen from which you accessed the Budget Request Totals screen.

**'F4' Budget Request Totals****DIRECTORS OF FINANCE****1<sup>ST</sup> SCREEN OF 3:**

SHIP - EXTRA! X-treme

MCBB-A COIN BUDGET REQUEST 12/19/2006 16:03

V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

BUDGET REQUEST TOTALS

PERMANENT PERSONNEL

	BUDGET	-ESTIMATED BUDGET-	REIM	-ESTIMATED REIM-
	SALARY	FRINGES	SALARY	FRINGES
CURR BDGT	1,539,526	213,070	812,835	112,496
REQUESTED	1,539,526	213,070	812,835	112,496
COMP BOARD	0	0	0	0
TOTAL PERMANENT PERSONNEL:		50		

TEMPORARY PERSONNEL

	BUDGET	-ESTIMATED BUDGET-	REIM	-ESTIMATED REIM-
	SALARY	FRINGES	SALARY	FRINGES
CURR BDGT	44,578	6,169	22,289	3,084
REQUESTED	0	0	0	0
COMP BOARD	0	0	0	0
TOTAL TEMPORARY PERSONNEL:		50,747		

F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

02/17

Connected to host: dtmvs2.state.va.us [165.176.127.4] (CIP0035D)

Keys: 190084 Saved: 0011

**PROCEDURES:**

- 1<sup>ST</sup> SCREEN OF 3:**

- ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your current budget information as of December 31<sup>st</sup>
- ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
- ✓ **'COMP BOARD'** - This line of information refers to the budget request as being reviewed or approved by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'
- ✓ **'FRINGE'** benefits listed are estimates only
- ✓ **'REIMBURSABLE'** figures displayed are the actual dollar amounts that will be returned to your locality

## 'F4' Budget Request Totals

### DIRECTORS OF FINANCE

#### 2<sup>ND</sup> SCREEN OF 3:

MCBB-B COIN BUDGET REQUEST 12/19/2006 16:03

V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

BUDGET REQUEST TOTALS

EQUIPMENT						
NEW	NEW	REPLACE	REPLACE	TOTAL	TOTAL	STRESSED
QTY	COST	QTY	COST	QTY	COST	COST
0	0	0	0	0	0	0
0	0	0	0	0	0	0

EQUIPMENT TOTAL :

F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

02/17

#### 2<sup>ND</sup> SCREEN OF 3:

- ✓ This screen displays equipment totals by equipment category
- ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - Line 1 becomes 'locked-in' when the Constitutional Officer certifies their budget request
- ✓ **SECOND LINE** of information displayed relates to the in-progress or approved request as completed by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'

## 'F4' Budget Request Totals

### DIRECTORS OF FINANCE

#### 3<sup>RD</sup> SCREEN OF 3:

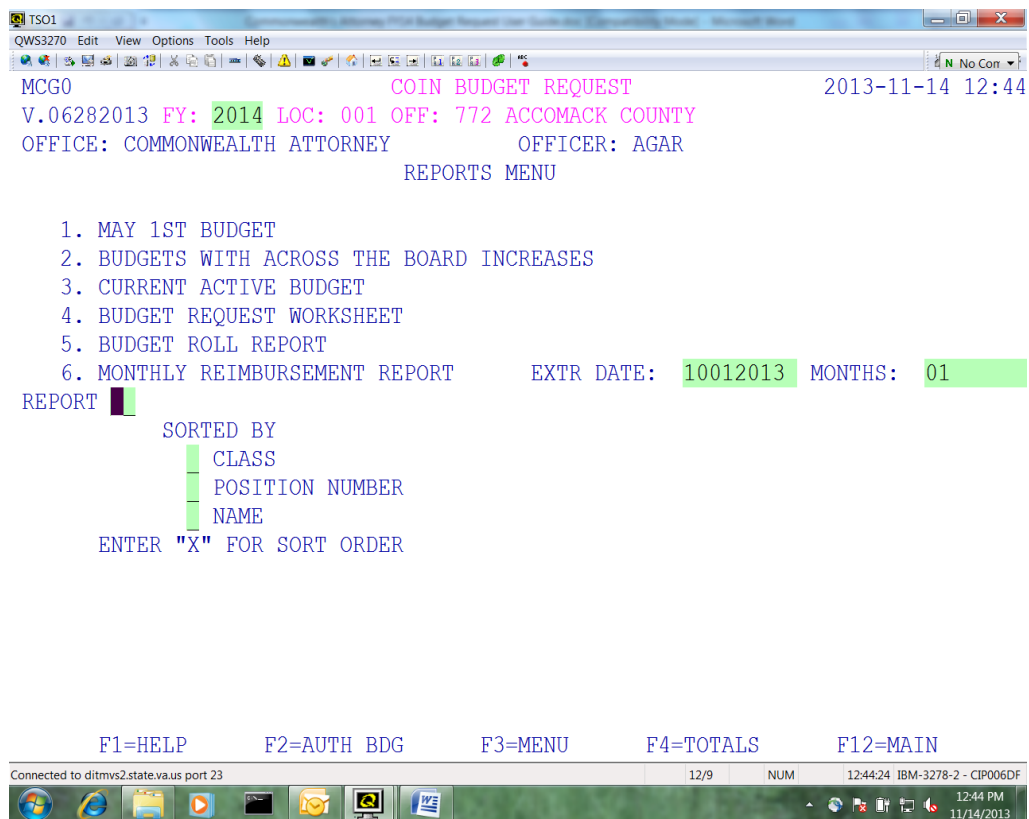
COIN BUDGET REQUEST				12/19/2006 16:03
MCBB-C				
V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY				
BUDGET REQUEST SUMMARY TOTALS				
TOTAL PERMANENT PERSONNEL..	CURR BDGT	1,539,526	REIMBURSABLE	812,835
	REQUESTED	1,539,526		812,835
	COMP BOARD	0		
TOTAL ADDITIONAL POSITIONS:	CURR BDGT	0		
	REQUESTED	0		
	COMP BOARD	0		
TOTAL TEMPORARY PERSONNEL..	CURR BDGT	44,578	REIMBURSABLE	22,289
	REQUESTED	0		0
	COMP BOARD	0		
TOTAL OFFICE EXPENSES.....	CURR BDGT	0	REIMBURSABLE	0
	REQUESTED	0		0
	COMP BOARD	0		
TOTAL EQUIPMENT EXPENSES...	CURR BDGT	0	REIMBURSABLE	0
	REQUESTED	0		0
	COMP BOARD	0		
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU				
02/17				

#### • 3<sup>RD</sup> SCREEN OF 3:

- ✓ Displays totals for each budget request broad-based category:
  - Permanent Personnel
  - Additional Positions
  - Temporary Personnel Funding
  - Office Expense Funding
  - Equipment Requests
- ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your current budget information as of December 31<sup>st</sup>
- ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
  - This information is subject to change as you make revisions to your budget request
  - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
- ✓ **'COMP BOARD'** - This line of information refers to the budget request as being reviewed or approved by the Compensation Board
  - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
  - When budget requests are approved by the Compensation Board (May 1<sup>st</sup> of each year) this information also becomes 'locked-in'

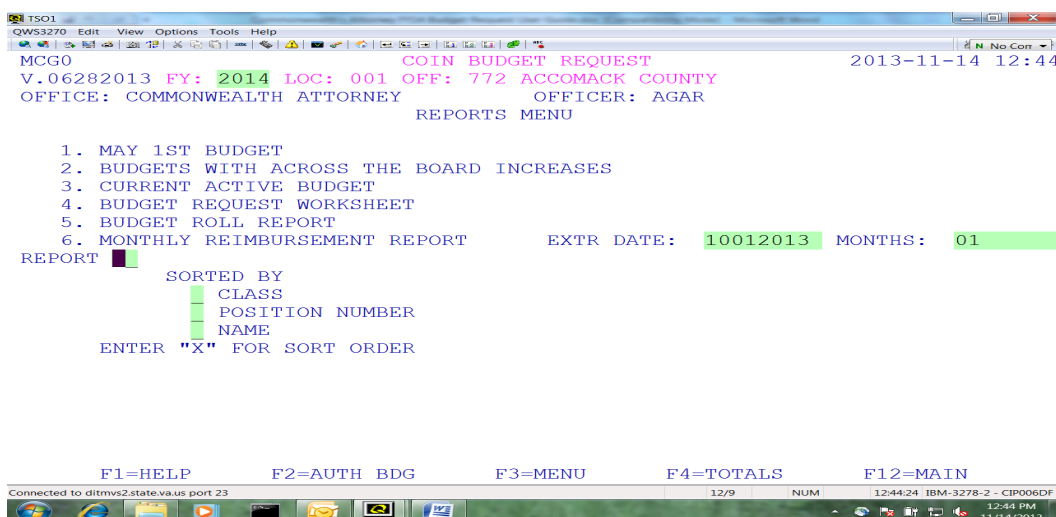
- Press 'F3' to exit the screen to the Budget Request Menu

## 15. Main Menu Option #5 Budget Reports



- Select Option #5- “Reports”

## Main Menu Option #5 - Budget Reports



There are 6 versions of the Budget Report that are available.

- Option #1 “May 1<sup>st</sup> Budget”- This is the Historical Budget Report, listing all changes to your budget since it went into effect.
- Option #2 “Budget Report W/Aug. Increase”- This is the Budget with the August 1 increases factored in. This report is available in July.
- Option #3 “Current Active Budget”– This is the Budget showing the personnel changes entered to date.
- Option #4 “Budget Request Worksheet”- This is the Budget Request Worksheet, this report may be downloaded to enter all personnel changes before entering them into the COIN system.
- Option #5 “Budget Roll”- This is the Budget as set on May 1<sup>st</sup> for the current Fiscal Year.
- Option #6 “Monthly Reimbursement Report”- This report details the salary and fringe benefit amounts for each individual position. By selecting the date and number of months to be viewed, multiple months may be downloaded at one time.

1. Change the Fiscal Year to the new fiscal year (FY24 for instance).
2. Enter the desired Budget Report option
3. Enter the sort option desired (if no sort sequence is specified the Budget Report will be printed in Class Code order). Governing Bodies will have the ability to request a Budget Report for each office in their locality. You will need to enter the Starting Office and Ending Office as well as the Sort Sequence. We recommend submitting a separate request for each office in your locality.
4. Press Enter and print the screen
5. **The name of the file to download will be displayed at the bottom of the screen.** Enter the name of the file in the download instructions #10

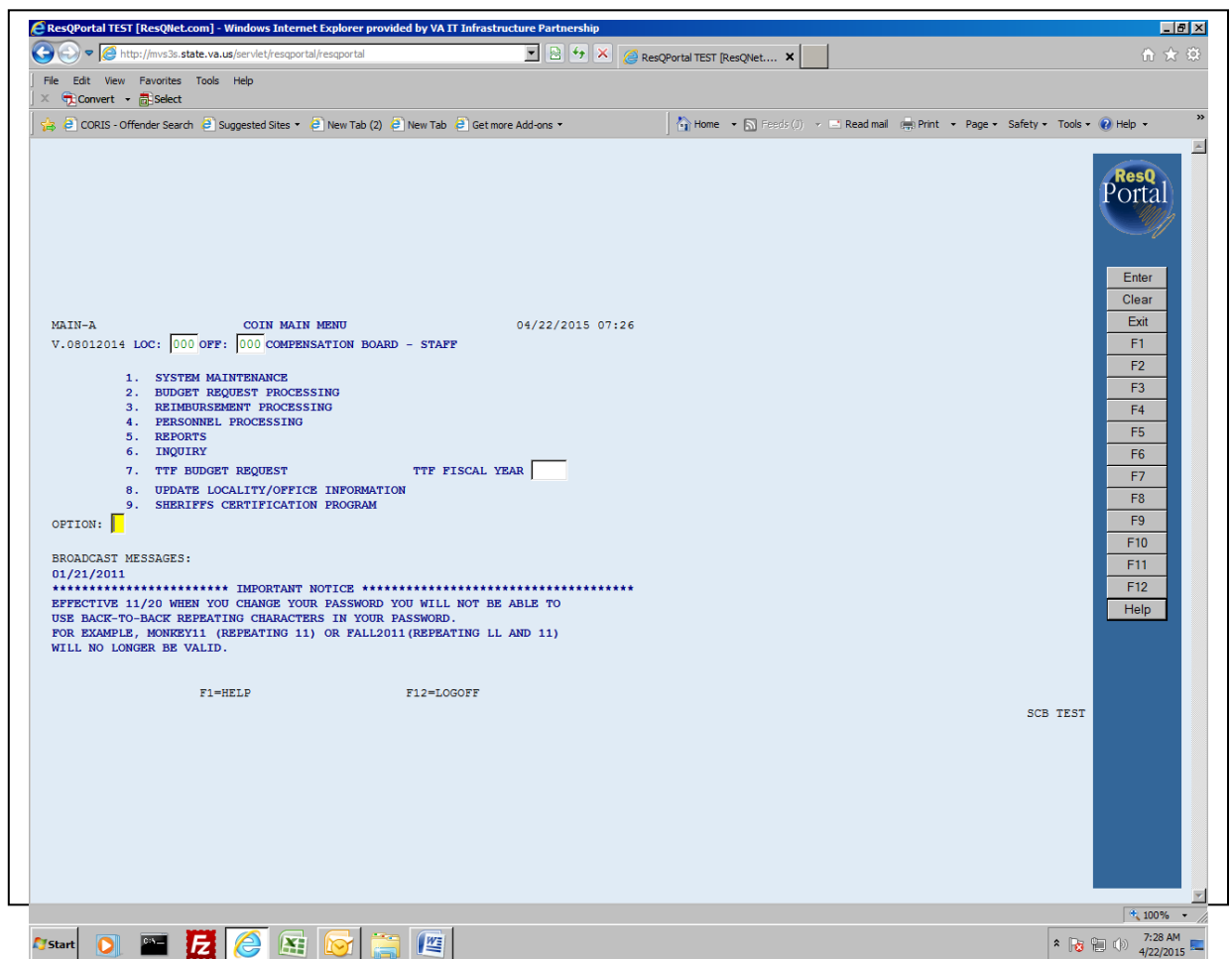


## 16. Download Instructions

### Downloading Budget Reports from COIN

NOTE: Beginning in FY19, officers and localities will no longer use FTP to download budget reports from COIN. These reports will still be ordered in the COIN system, but users will receive an email message containing the budget report file attachment.

### Generating Reports in COIN



- Navigate to the COIN Main Menu; from the Main Menu, select option 5 (Reports) and press the 'Enter' key.

## Main Menu Option #5 – Reports

There are 6 reports that are available:

- **Option #1 “May 1<sup>st</sup> Budget”**- This is the Budget as typically approved by the Compensation Board during its April board meeting (note, the FY22 budget was approved at the June board meeting). This is the basis for the budget effective July 1 of that year. Note: Be sure to change **FY** at the top of the screen for the Budget “ending” year (2022).
- **Option #2 “Budget Report with Across the Board Increases Increase”**- This report lists current positions and the salary increase, if any, as provided by the Appropriation Act. This report is available **one month prior** to the effective date of the salary increase.
- **Option #3 “Current Active Budget”**– This is the historical budget report, listing all changes to your budget since it went into effect.
- **Option #4 “Budget Request Worksheet”**- This is the Budget Request Worksheet, this report may be downloaded to enter all personnel changes before entering them into the COIN system.
- **Option #5 “Budget Roll Report”** – This is the Budget as it went into effect on July 1. This could differ from the May 1<sup>st</sup> Budget.
- **Option #6 “Monthly Reimbursement Report”** – This reports list all line items for a specified month’s reimbursement.

## Main Menu Option #5 – Reports

## CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

MC60 COIN BUDGET REQUEST 2018-06-15 08:14

V.01242018 FY: 2019 LOC: 001 OFF: 307 ACCOMACK COUNTY OFFICER: GODWIN

OFFICE: SHERIFF

REPORTS MENU

1. MAY 1ST BUDGET
2. BUDGETS WITH ACROSS THE BOARD INCREASES
3. CURRENT ACTIVE BUDGET
4. BUDGET REQUEST WORKSHEET
5. BUDGET ROLL REPORT
6. MONTHLY REIMBURSEMENT REPORT

EXTRA DATE: 05012018 MONTHS: 01

REPORT 1

SORTED BY (ENTER "X" FOR SORT ORDER)

CLASS

POSITION NUMBER

NAME

REPORTS WILL BE SENT BY E-MAIL. ENTER E-MAIL ADDRESS BELOW:

KBARRETT@CO.ACCOMACK.VA.US

F1-HELP F2-AUTH BDG F3-MENU F4-TOTALS F12-MAIN

SCB TEST

- Change the Fiscal Year to 2024 ( FY24 Approved Budget Report)
- Enter the report option (1-6)
- Enter the desired sort sequence, if no sort sequence is specified, the Budget Report will be printed in Class Code order.
- Change the default email address to the specific email address of the individual to receive the report

Governing Bodies have the ability to request a Budget Report for each office type in their locality by entering the office code on the COIN Main Menu, proceed to option 5 (reports) for each specific office type, and then follow the instructions above (307-Sheriffs/Superintendents; 717-Directors of Finance; 771-Commissioners of the Revenue; 772-Commonwealth's Attorneys; 773-Circuit Court Clerks; 774-Treasurers).

### **Technical Assistance**

Users with **Google-hosted email** may experience problems with receiving a file attachment in the email received from the COIN system. Instead, users with Google-hosted email may receive the budget report loaded into the body of the email. If you experience this problem (report contained in body of email and no file attachment received), please email one of the individuals listed below and notify them that you have experienced this specific problem. Please be sure to include your Locality number and your Office number in your email request so that we may assist you in receiving the budget report in a file attachment.

Bill Fussell – [william.fussell@scb.virginia.gov](mailto:william.fussell@scb.virginia.gov) (All Offices)  
Joan Bailey – [Joan.Bailey@scb.virginia.gov](mailto:Joan.Bailey@scb.virginia.gov) (Treasurers, Finance Directors, Commissioners)  
Paige Christy – [Paige.Christy@scb.virginia.gov](mailto:Paige.Christy@scb.virginia.gov) (Commonwealth's Attorneys and Clerks)  
Donna Foster – [Donna.Foster@scb.virginia.gov](mailto:Donna.Foster@scb.virginia.gov) (Sheriffs/Superintendents)  
Brian Bennett – [Brian.Bennett@scb.virginia.gov](mailto:Brian.Bennett@scb.virginia.gov) (Sheriffs/Superintendents)  
Dan Munson – [dan.munson@scb.virginia.gov](mailto:dan.munson@scb.virginia.gov) (All Offices)

## 17. Appendix

### Classifications And Pay Plans

#### DIRECTORS OF FINANCE

**CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE DIRECTOR OF  
FINANCE**  
AUGUST 1, 2022 - December 31, 2022

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST II	GC/CTII	1	Administrative	24,163	45,476
FISCAL ASSISTANT DEPUTY I SECRETARY I	FA/DI/SECI				
DEPUTY II SECRETARY II	DII/SECII	2	Sr. Administrative	28,869	55,571
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII/AA	4	Professional	34,514	70,972
DEPUTY IV	DIV				
CHIEF DEPUTY I	CDI	7	Sr. Professional	41,235	92,694
CHIEF DEPUTY II	CDII				
CHIEF DEPUTY III	CDIII	8	Supervisory/ Management	53,615	141,580
CHIEF DEPUTY IV	CDIV				

\* Per Code of Virginia, §15.2-1627.1B, the salary of any employee of a Constitutional Officer cannot exceed 90% of the salary of the Constitutional Officer.